

# Hawaii Marketing Effectiveness Study

2003 Annual Report

February 2004



the sixth sense of business™

# ***Purposes and Methodology***

# Research Objectives

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- This is the annual report of the first (benchmark) study from which future waves will be compared. Over time, the research will measure the impact and effectiveness of advertising campaigns. Specifically, it will measure and monitor changes in:
  - Awareness and Image of Hawaii and Competitors
  - Consideration of Hawaii as Destination
  - Intent and/or Actual Visits to Hawaii
  - Ratings of Hawaii and Competitors
  - Travel Patterns and Info on Hawaii Trip (Accommodations, Length of Visit, Frequency, Satisfaction)
  - Attributes/Situations Impacting Travel Plans as Needed

# Methodology

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## Mail survey methodology:

- Because of a late start (February 11 through March 31), Quarter 1 weekly mailings were larger than ensuing quarters. In the US, 575 were mailed every week; half to households in the Eastern US and half to those in the Western US. Except for the first week (February 26 at 700), 540 were mailed each week to Japanese households.
- In Quarter 2 (April 7 through June 30), 350 were mailed weekly in the US (175 to Eastern and 175 to Western households). Japanese households were sent 260 weekly, from April 11 through June 23.
- In Quarter 3 (July 7 through September 15), 325 were mailed weekly in the US (175 in the East and 150 in the West) with a double mailing on 9/22/03. In Japan, 220 were mailed per week (July 7 through September 15) with a double mailing on 9/22/03 for a total of 2,860.

# Methodology *(cont)*

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- In Quarter 4 (October 6 through December 15), 325 surveys were mailed weekly in the US (175 in the East and 150 in the West) with two double mailings on 12/8 and 12/15. In Japan, 220 were mailed per week from 10/6 through 11/10, and 513 were mailed each on 11/17, 11/25, and 12/01 for a total of 2,860.
- Qualified respondents have taken an overnight leisure trip of 500 miles (US) or an international trip (Japan) in the past 24 months.

# Mailout and Qualified Returns

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	<u>Total</u>	<u>Eastern US</u>	<u>Western US</u>	<u>Japan</u>
<b>Quarter 4:</b>				
Mailout	7,085	2,275	1,950	2,860
Qualified	1,238	408	428	402
<b>Quarter 3:</b>				
Mailout	7,085	2,275	1,950	2,860
Qualified	1,312	447	457	408
<b>Quarter 2:</b>				
Mailout	7,410	2,275	2,275	2,860
Qualified	1,385	451	524	410
<b>Quarter 1:</b>				
Mailout	7,410	2,275	2,275	2,860
Qualified	1,377	456	499	422

# TNS Plog's Future Index™

Measures Direction and Momentum of Change in Travel Behavior

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## Net Increase (Increase - Decrease) Stay the Same

Greater than zero = Growth

100 = “Net increase” = “stay the same”

Less than zero = Decline

-100 = “Net decrease” = “stay the same”

Note: If more respondents change than stay the same (very strong *momentum*), the index would exceed 100 or -100.

# TNS Plog's Future Index™ Example

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Example: Total US West (% of Respondents from Q4, 2003)

24% increase – 16% decrease  
60% stay the same

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8/60 = 13% (See Figure 16)

This represents improvement in travel expectations, but the score (13) is well below 100, indicating that the majority stay the same, i.e., moderately slow momentum. If the proportion had exceeded 100, then it would mean that more people change than stay the same, indicating very rapid momentum.



# Destination Satisfaction Index

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- Description: Respondents indicate which destinations they have visited for leisure in the past three years and which ones they especially like. The percent who especially like a place (and who have visited it) is used to develop a satisfaction ratio.
- The approach offers a level “playing field.” That is, small destinations have the same opportunity to get high scores as larger ones since the number of visitors to a place does not matter -- only the percent who went home happy. A score of 100 represents perfection (everyone who visited a destination also especially liked it).
- It covers only destinations that were visited in the past three years, rather than all past vacation experiences, to ensure that perceptions are relatively current.

***Overview:***  
***Demographics and Travel Patterns***

# Hawaii Visitors vs. Other Travelers in 2003

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- Hawaii visitors tend to be of similar age as total long-distance US travelers, but appear just a shade younger in the past 2 Quarters compared to Quarters 1 and 2. Of the 3 markets, Japanese visitors are much younger.
- Within both US markets, Hawaii visitors report higher incomes than total long-distance air travelers, but the difference is less notable in the Japanese market.
- Visitors to Hawaii take a greater number of trips than others in each of the three markets. (except the Eastern US in Quarter 1.)

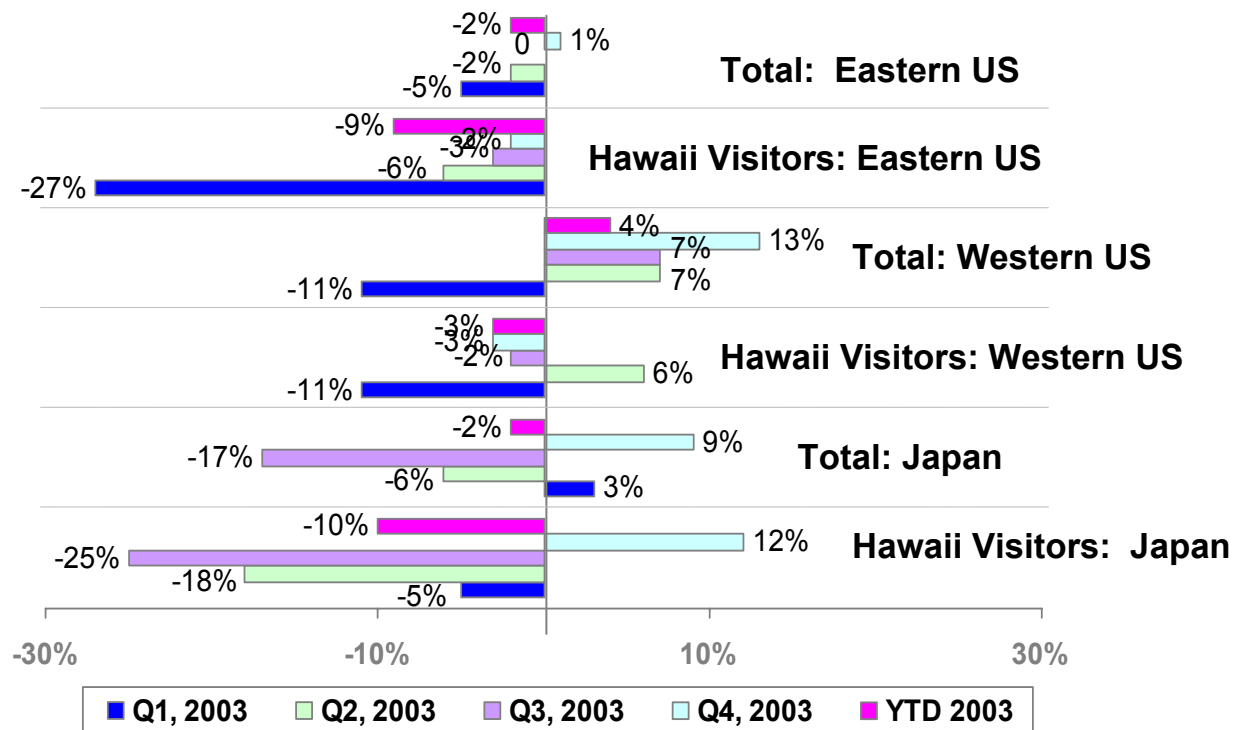
# Hawaii Visitors vs. Total Travelers

	Total All LD* Respondents	Hawaii Visitors Past 3 Years			
	2003 YTD	Q1: Jan-Mar:	Q2: Apr-Jun	Q3: Jul-Sep	Q4: Oct-Dec
<b>EASTERN US</b>					
Median Age	53	56	55	51	52
Median Income	\$55,700	\$65,200	\$67,000	\$71,300	\$76,200
# LD* Trips Annually	2.1	2.0	2.6	2.8	2.9
<b>WESTERN US</b>					
Median Age	52	55	53	52	49
Median Income	\$55,800	\$65,000	\$68,300	\$65,500	\$64,100
# LD* Trips Annually	2.2	2.6	2.5	2.7	3.0
<b>JAPAN</b>					
Median Age	42	40	42	41	42
Median Income	\$58,900	-	\$64,500	\$59,200	\$64,500
# Int'l Trips Past 2 Years	1.7	2.1	2.0	1.8	1.9

\*LD=Long-distance travelers: 500+ Mile Air Trip in Past 12 Months

# Overall: TNS Plog's Future Index™

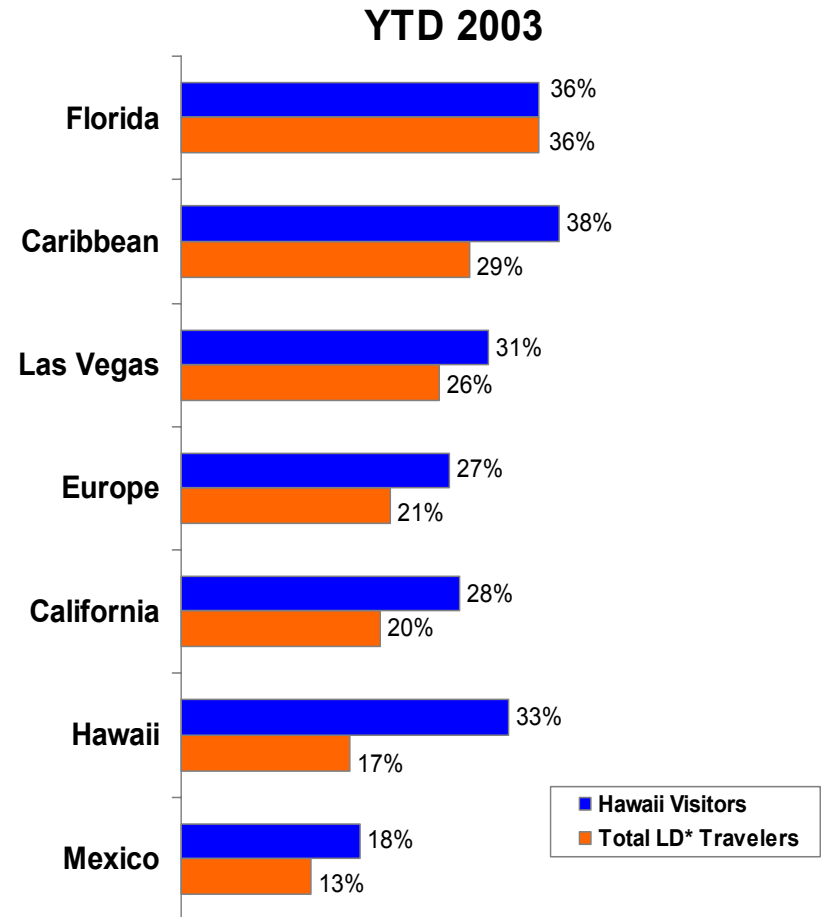
- Travelers' viewpoint about vacations point to a volatile year in 2003 with considerable degradation in plans. Only the total Western US Market is positive YTD. However, the year ends (Quarter 4) with a more upbeat promise for the future for Japan and the total Western Market.



# ***Eastern US Market: Demographics and Travel Patterns***

# Eastern US Market: Considered Destinations (Q3)

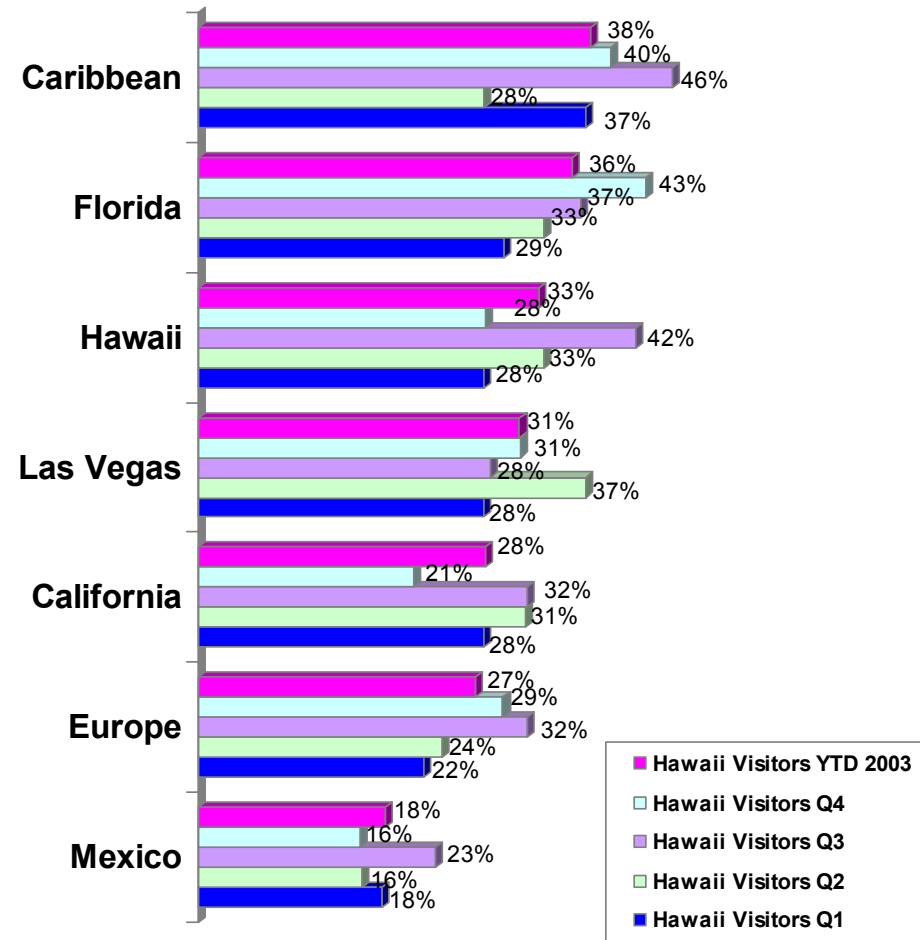
- The top destinations selected by Eastern US 500+ mile air travelers are the same as for Hawaii visitors, but the ranking shifts. Those who have visited Hawaii are more likely to choose places that are farther away.
- As noted in the quarterly reports, Hawaii visitors (past 3 years) are more likely than other travelers to choose each listed destination, except Florida, which appeals equally to both segments.



LD\* = Long-distance: 500+ mile air travelers

# Eastern US Market: Considered Destinations (Q3)

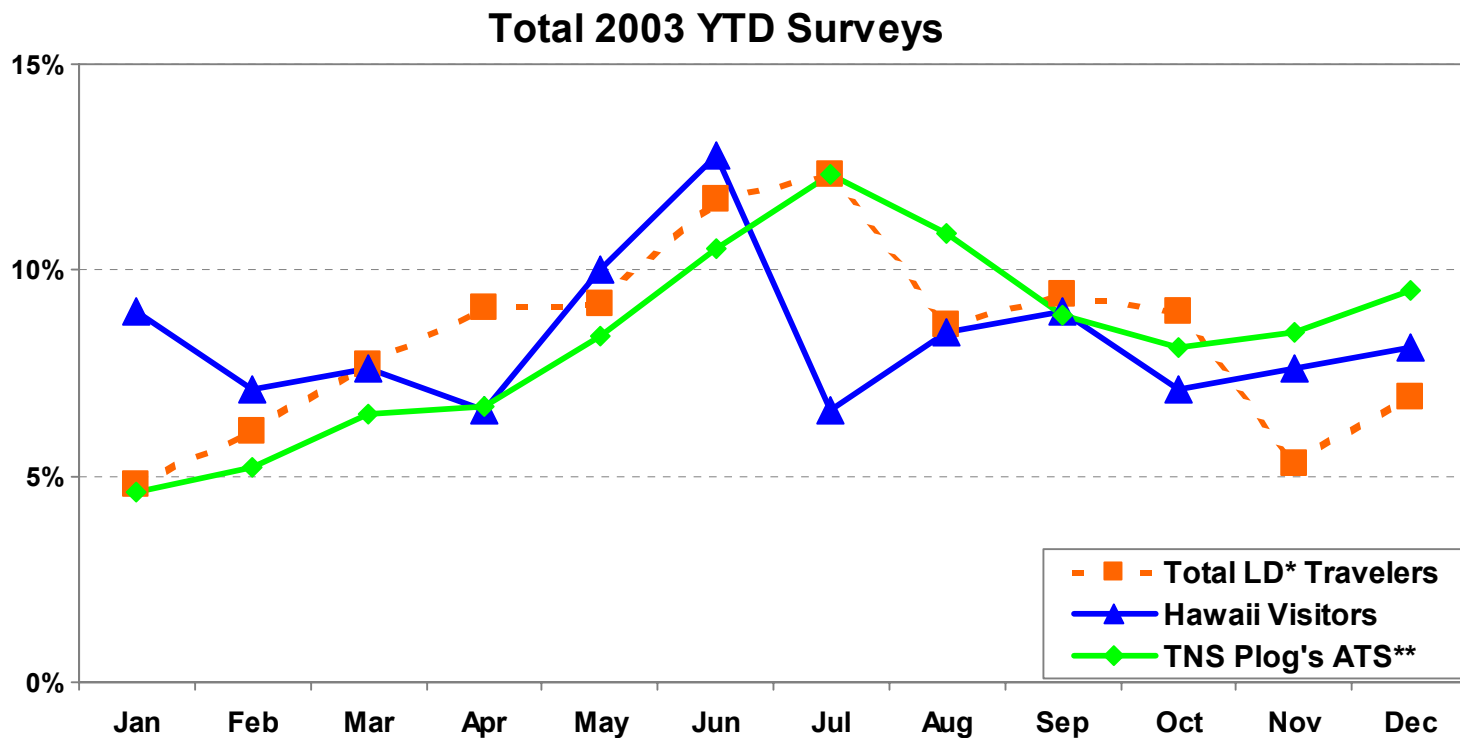
- Hawaii visitors from the Eastern US noticeably alter the ranking of their list of considered destinations from wave to wave, possibly reflecting seasonal preferences or varying reactions to international air travel.
- Each quarter, the Caribbean and Florida vie for the top spot in the consideration set. For the year, Hawaii places third – somewhat above Las Vegas, but clearly leading California, Europe, and Mexico.





# Eastern US Market: Timing of Next Vacation (Q4)

In the Eastern US Market, 2003 Hawaii visitors and total LD\* travelers follow a similar pattern as US travelers in general (from TNS Plog's American Traveler Survey), except that the Hawaii visitor is less inclined to travel in July and more likely to travel in the first quarter of the year.

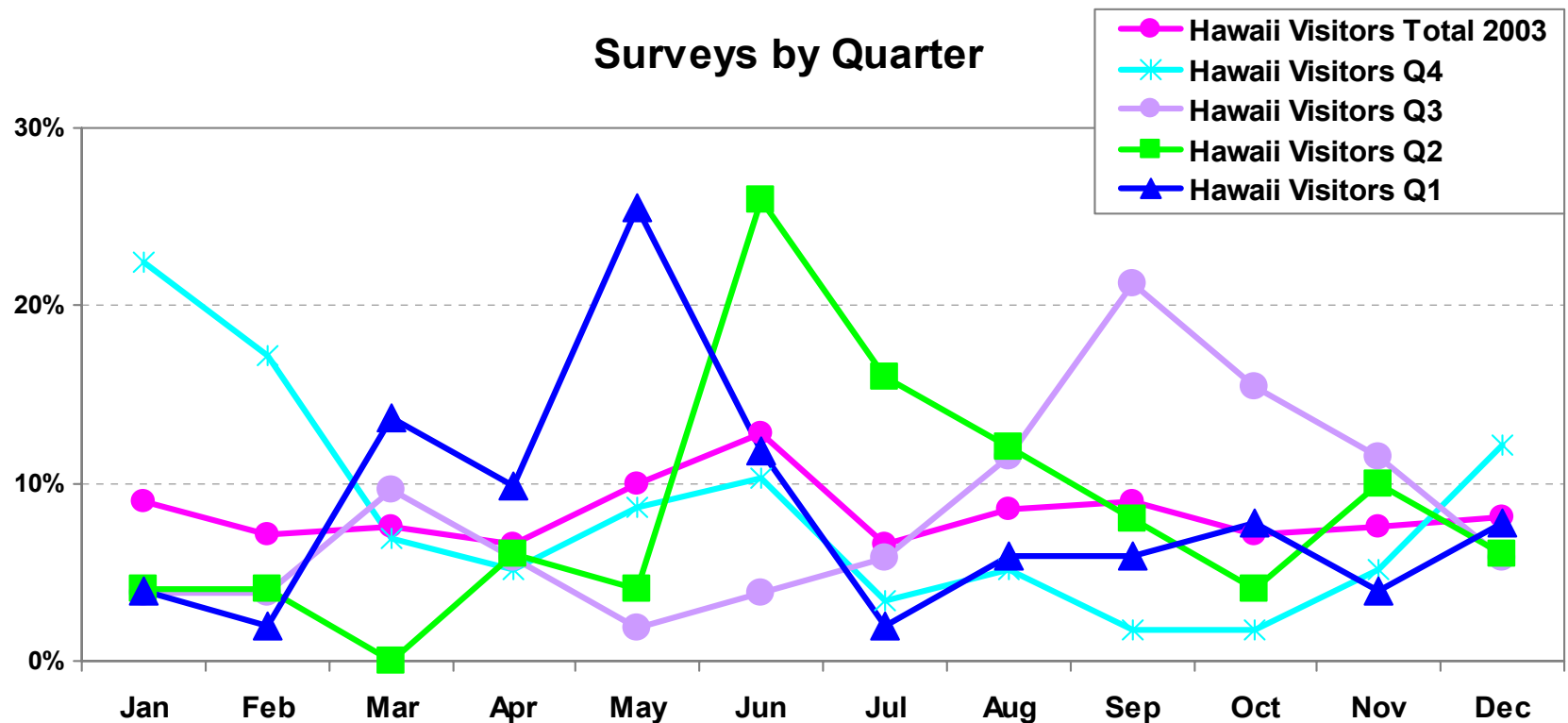


LD\* = Long-distance: 500+ mile air travelers

ATS\*\* = TNS Plog Research's 2003 American Traveler Survey, proportion of trips by month

# Eastern US Market: Timing of Next Vacation (Q4)

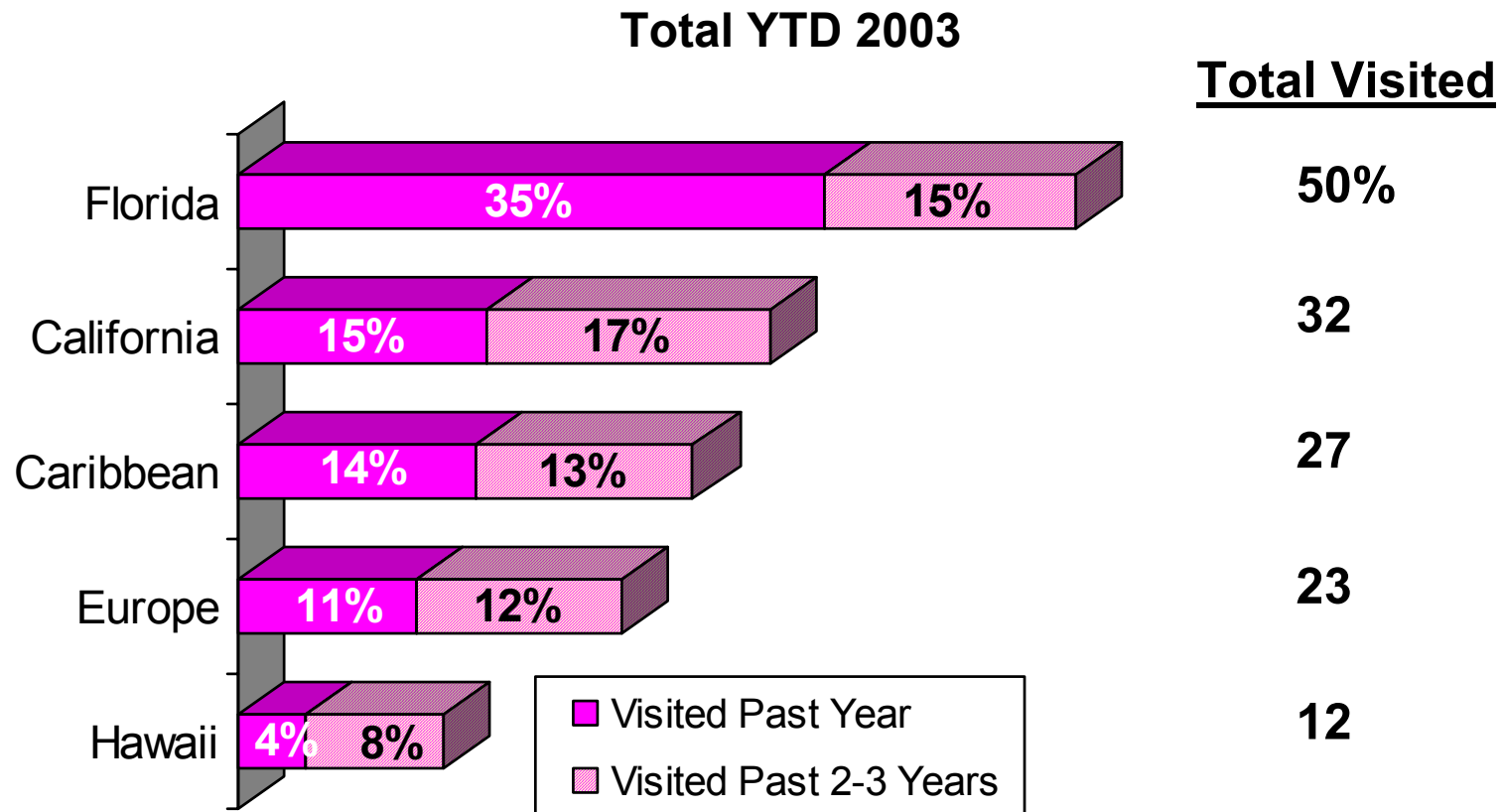
Each quarter, the largest proportion of Hawaii visitors expect to take their next trip soon after the survey is conducted. Over the year, timing for the next trip is more stable, peaking in June.



LD\* = Long-distance: 500+ mile air travelers

# Eastern US Market: Destinations in Past (Q6) (Visited Past Year/Past 3 Years)

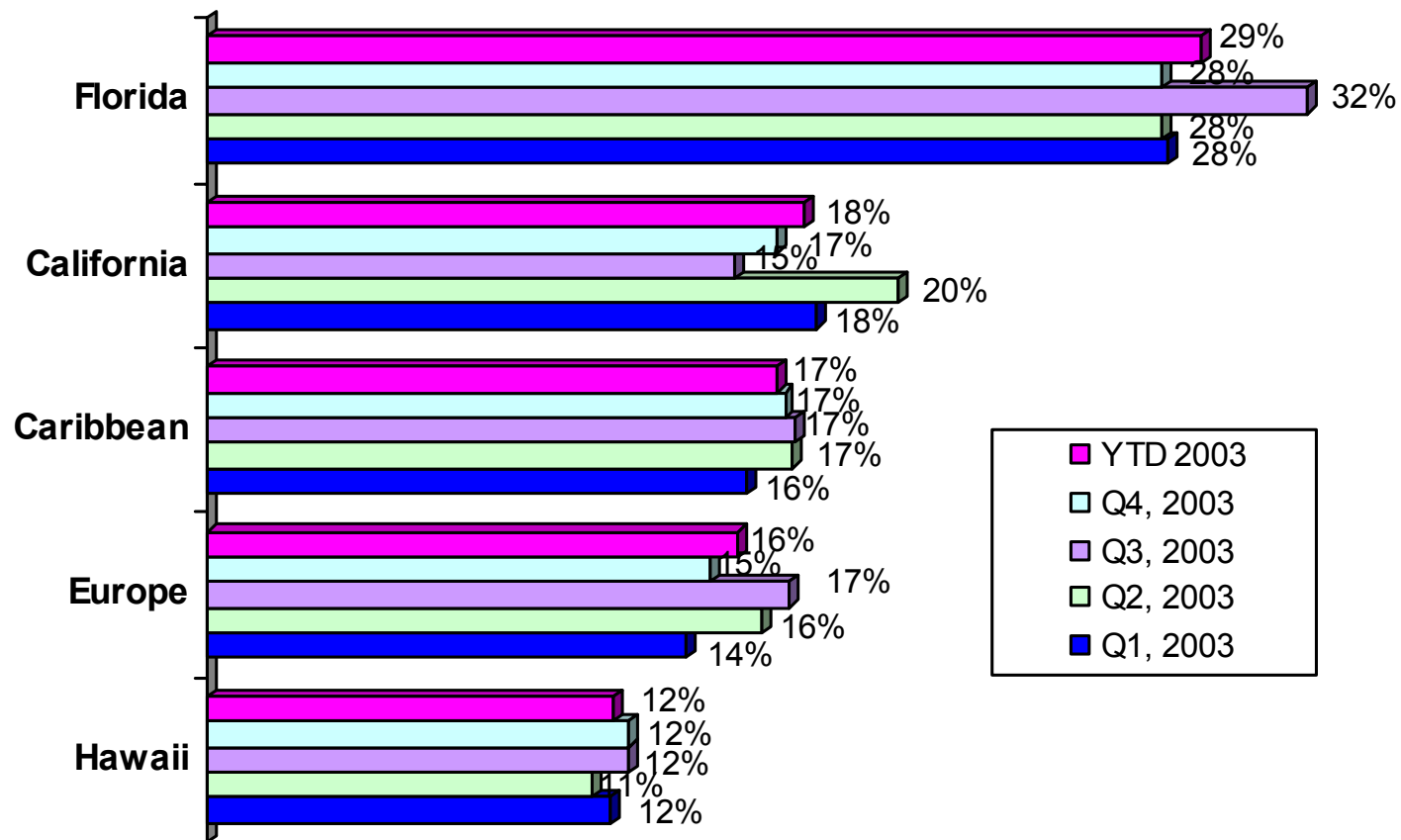
Florida clearly leads as the long-distance destination most likely visited by US travelers from the East -- Hawaii places last of these 5 competitors.



# Eastern US Market: Destinations Planned (Q6)

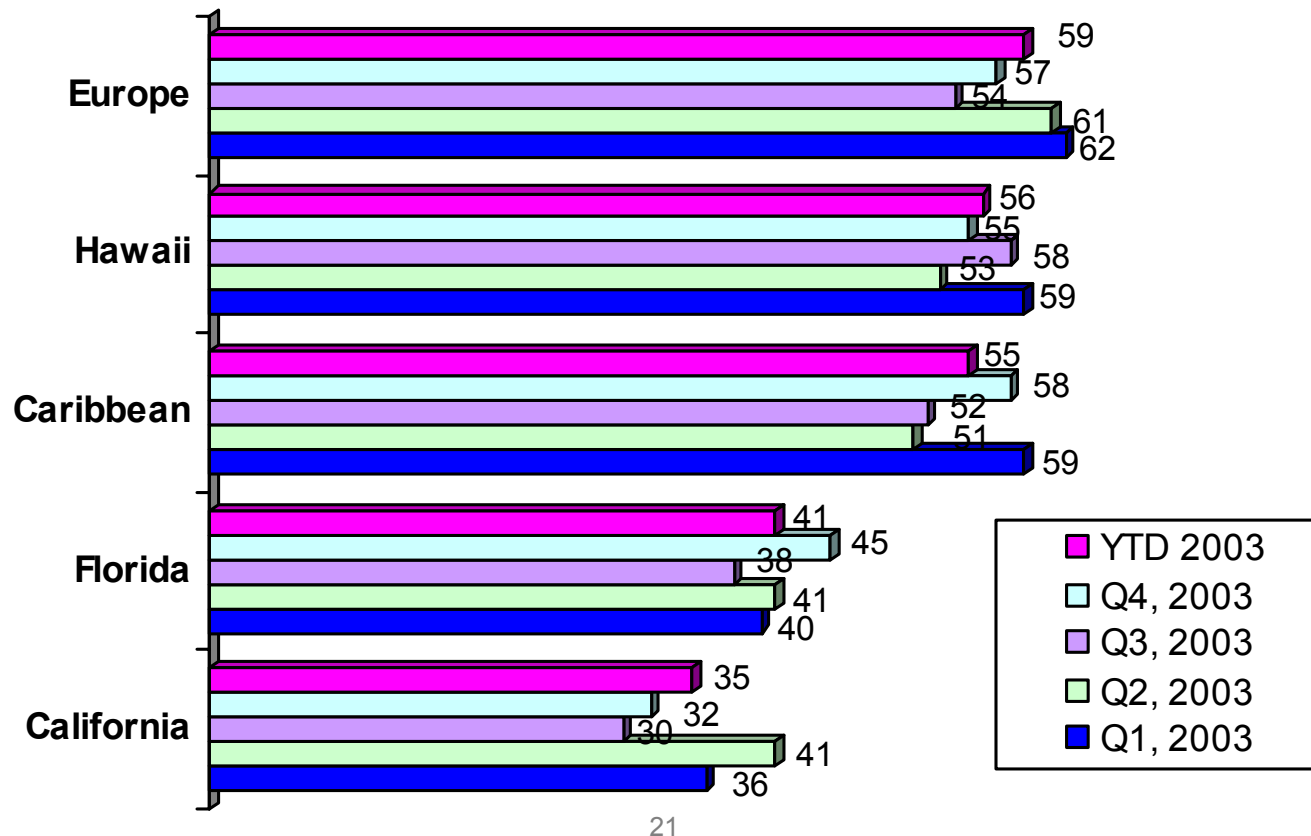
## (Plan to Visit for Leisure Within 24 Months)

When long-distance travelers choose destinations for trips that they plan to take within 2 years, Florida consistently ranks first and Hawaii ranks last among the competitive set. Little variation appears by survey timing, except for interest in California.



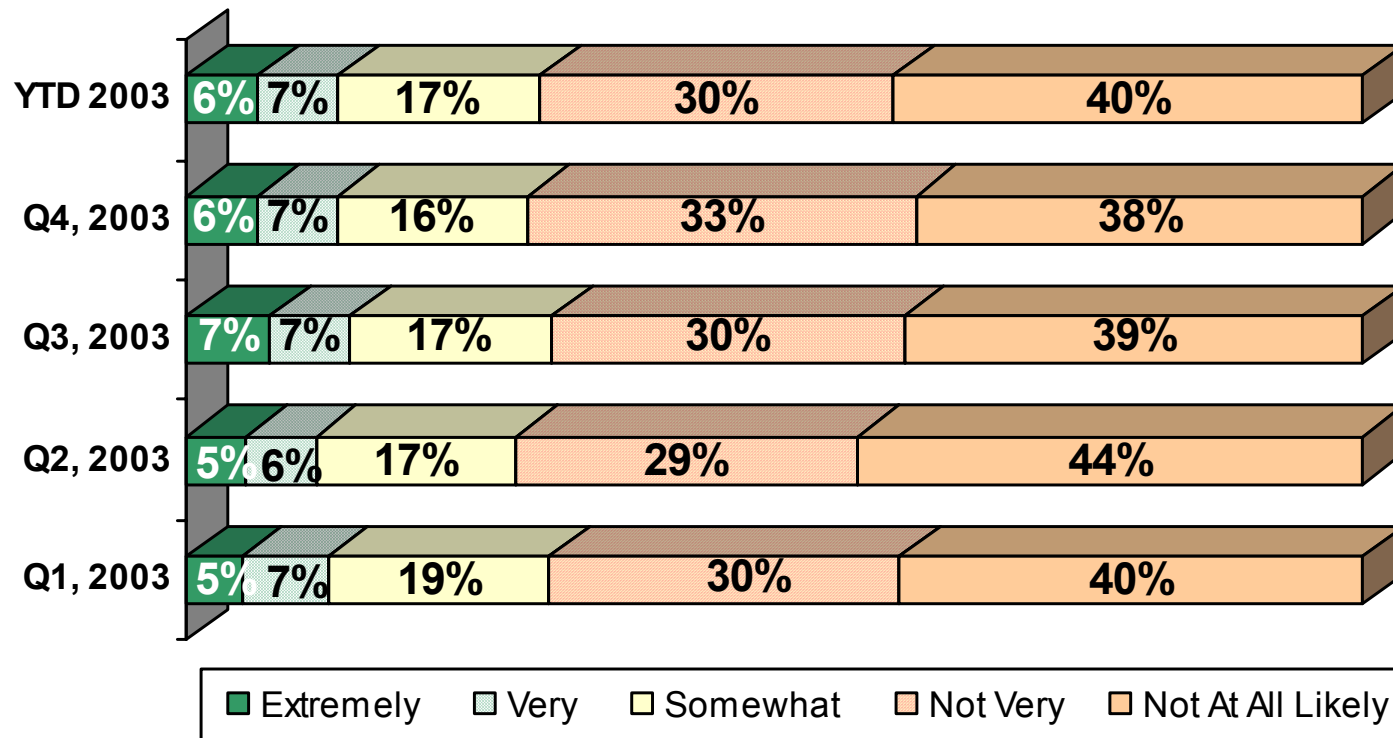
# Eastern US Market: Satisfaction Index (Q6) (Especially Like/Have Visited)

Although Hawaii consistently receives high marks for satisfying its visitors, Europe pulls slightly ahead over the course of the year. The trio of Hawaii, Europe, and the Caribbean swap the lead from quarter to quarter; each provides superior vacation experiences. California exhibits the least interest and greatest volatility.



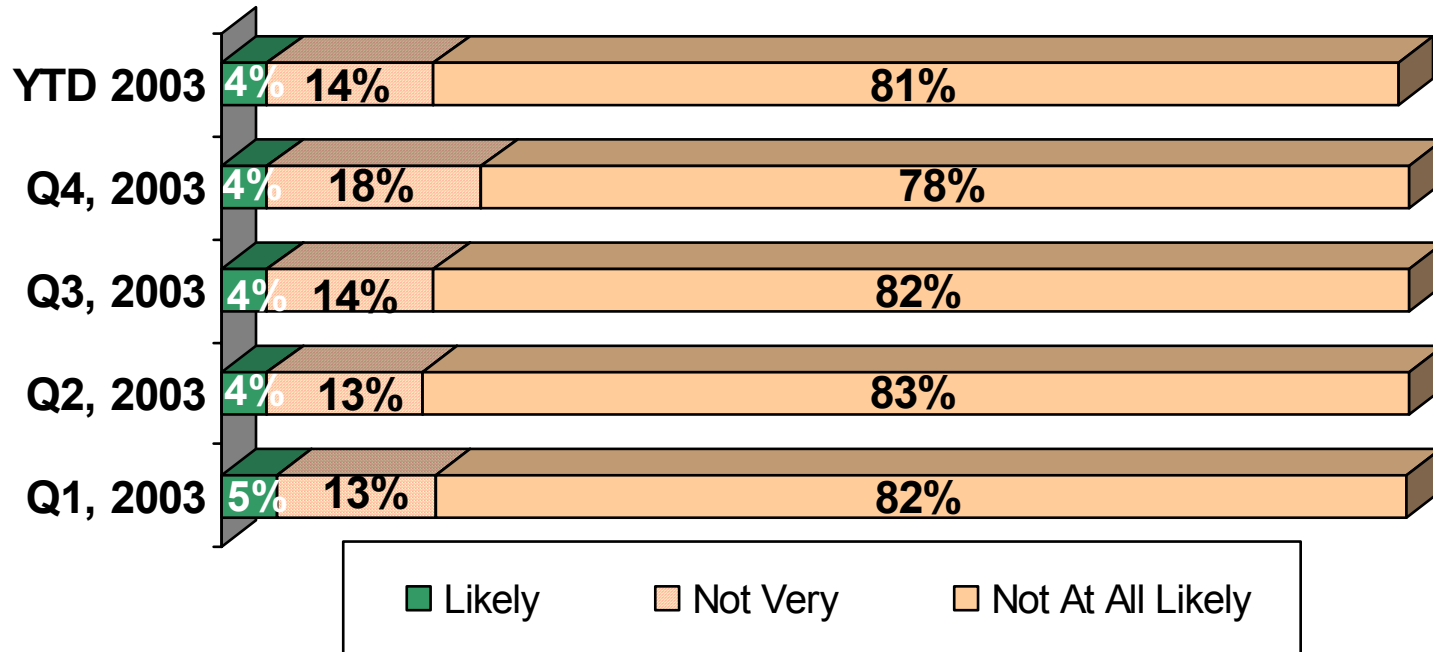
# Eastern US Market: Likely to Visit Hawaii FOR LEISURE (Q14)

However, Hawaii faces many challenges in enticing Eastern US travelers to visit in the next 24 months; specifically, distance and time, cost, and competitor destinations.



# Eastern US Market: Likely to Visit Hawaii FOR BUSINESS (Q15)

Hawaii is infrequently cited as a business destination (next 24 months).



***Eastern US Market:  
Hawaii Specific Evaluations***



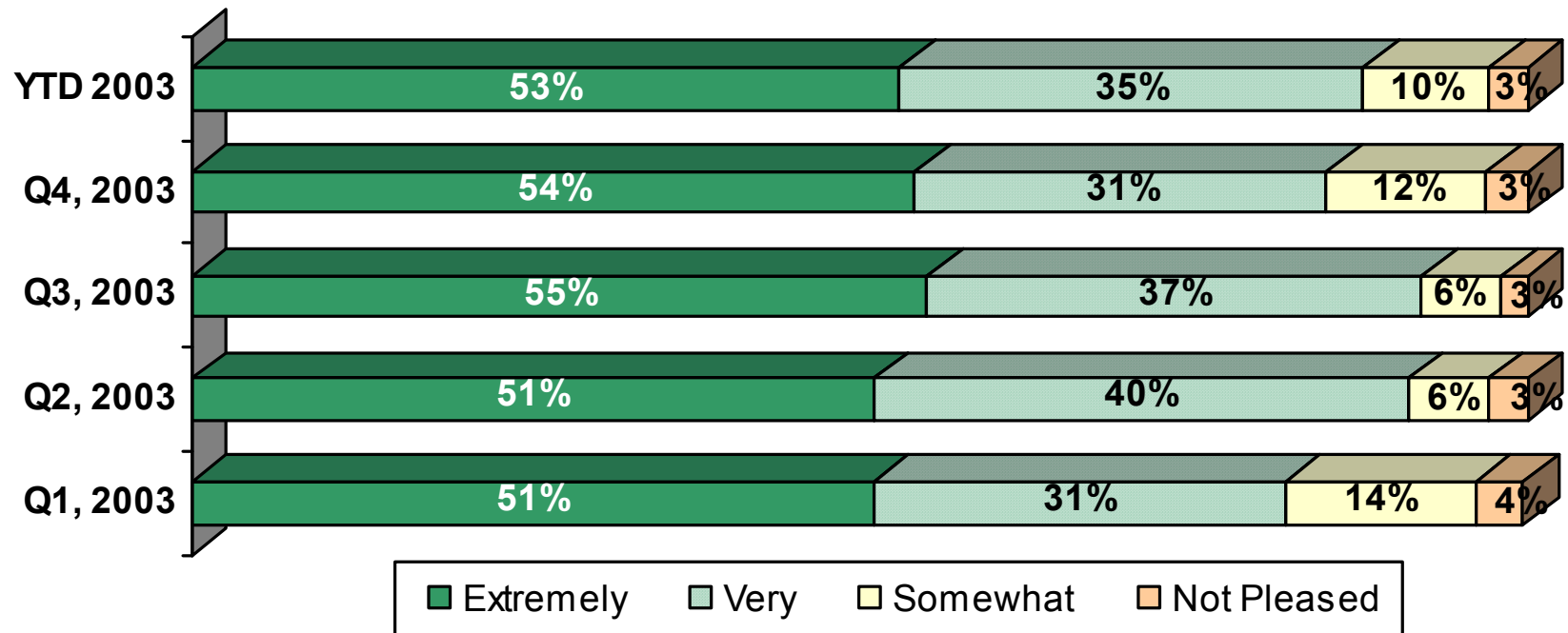
# Eastern US Market: Hawaii Visitation (Q7)

Nearly two in five (38%) Eastern US 500+ mile air travelers have visited Hawaii in the past, but the proportion drops dramatically when looking at the recent past (12% past 3 years, 4% past year). Meanwhile, except for Quarter 4, the average number of visits increases with more recent visitation.

	Visited Hawaii				
	2003 YTD	W1: Jan-Mar:	W2: Apr-Jun:	W3: Jul-Sept	W4: Oct-Dec
<b>Total Western Market (Base)</b>	<b>1,762</b>	<b>456</b>	<b>451</b>	<b>447</b>	<b>408</b>
<b>% Ever Visited Hawaii</b>	<b>38%</b>	<b>39%</b>	<b>36%</b>	<b>38%</b>	<b>41%</b>
<b>Average # of Trips to Hawaii</b>	<b>2.2</b>	<b>2.3</b>	<b>2.2</b>	<b>2.5</b>	<b>1.8</b>
<b>% Visited Hawaii Past 3 Years</b>	<b>12</b>	<b>11</b>	<b>11</b>	<b>13</b>	<b>14</b>
<b>Average # of Trips to Hawaii</b>	<b>3.1</b>	<b>2.7</b>	<b>3.5</b>	<b>4.1</b>	<b>2.0</b>
<b>% Visited Past Year</b>	<b>4</b>	<b>4</b>	<b>3</b>	<b>5</b>	<b>5</b>
<b>Average # of Trips to Hawaii</b>	<b>4.3</b>	<b>3.5</b>	<b>7.2</b>	<b>4.6</b>	<b>1.7</b>

# Eastern US Market Hawaii Visitors: How Pleased With Last Visit (Q13) (Ever Visited)

Visitors rate Hawaii very highly in its ability to please -- similar to results noted earlier on the satisfaction index among multiple destinations. During the year, more than half assign Hawaii the highest possible score and almost 9 out of 10 (88%) feel *very* or *extremely* pleased with their visit.

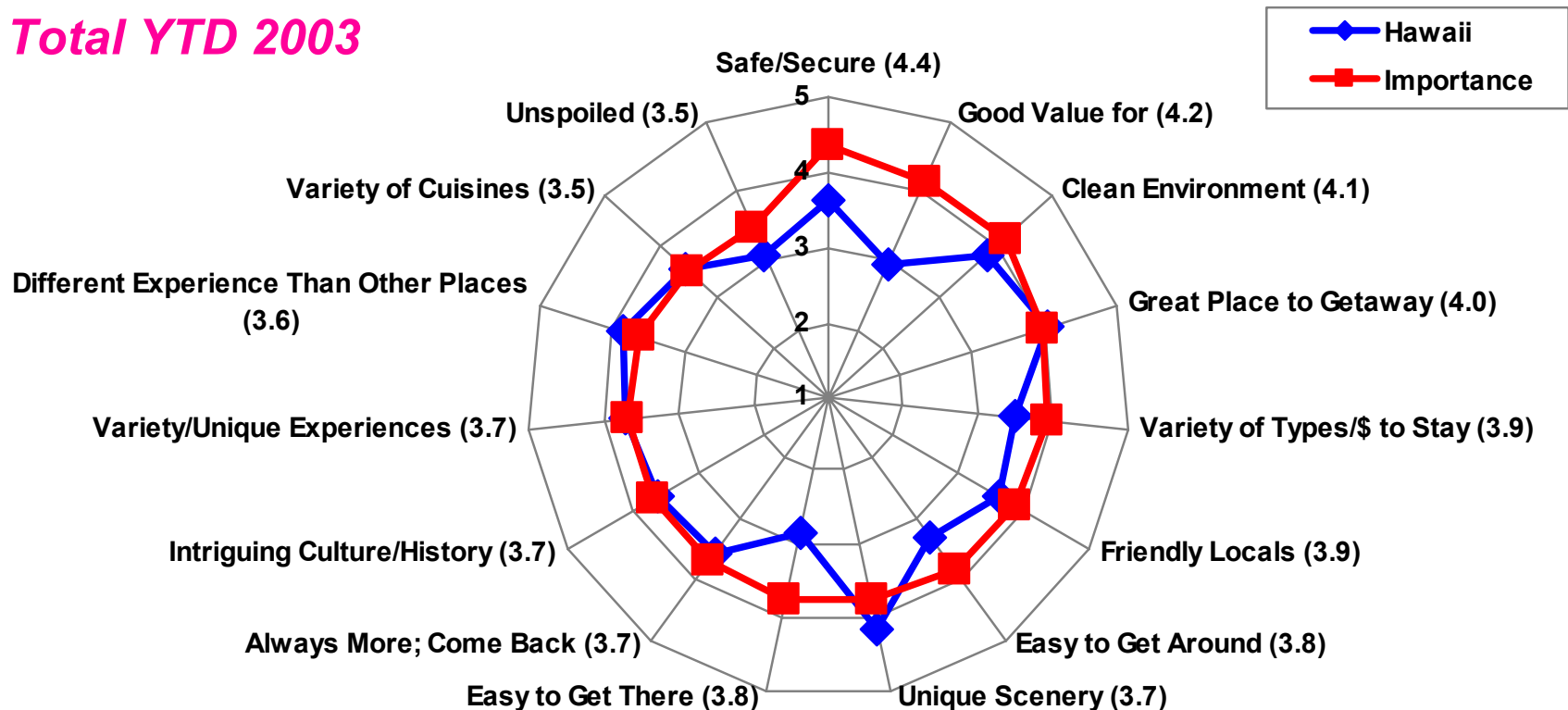


***Eastern US Market:  
Importance of Attributes and Ratings of  
Hawaii vs. Competitive Destinations***

# Eastern US Market: Importance/Ratings (Q5)

Travelers generally assign high scores to the Hawaii experience, except for dimensions that are consistent with its distance from this market: *Good Value for the Money* and *Easy to Get There*. It also trails on *Safe/Secure*.

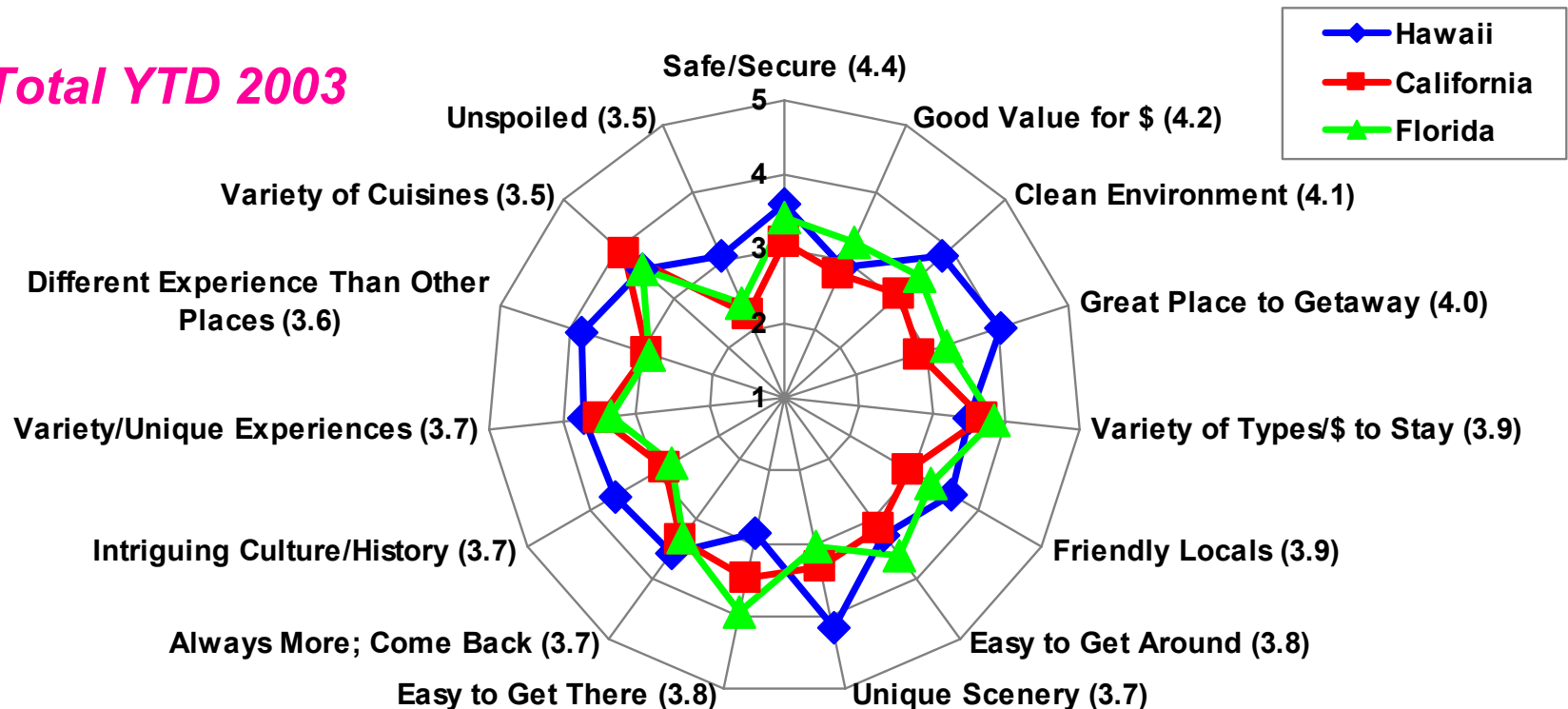
## Total YTD 2003



# Eastern US Market: (Gap) Hawaii/ Florida/California (Q5)

Although **Hawaii** captures fewer visitors than Florida or **California**, travelers rate it much higher on attributes that are most important to them. Exceptions include: *Good Value for the Money* and *Easy to Get Around* (**FL** wins on both); *Variety of Cuisines* (**CA** leads); *Variety of Types and Prices of Places to Stay* and, of course, *Easy to Get There* (**CA** & **FL** higher on both attributes).

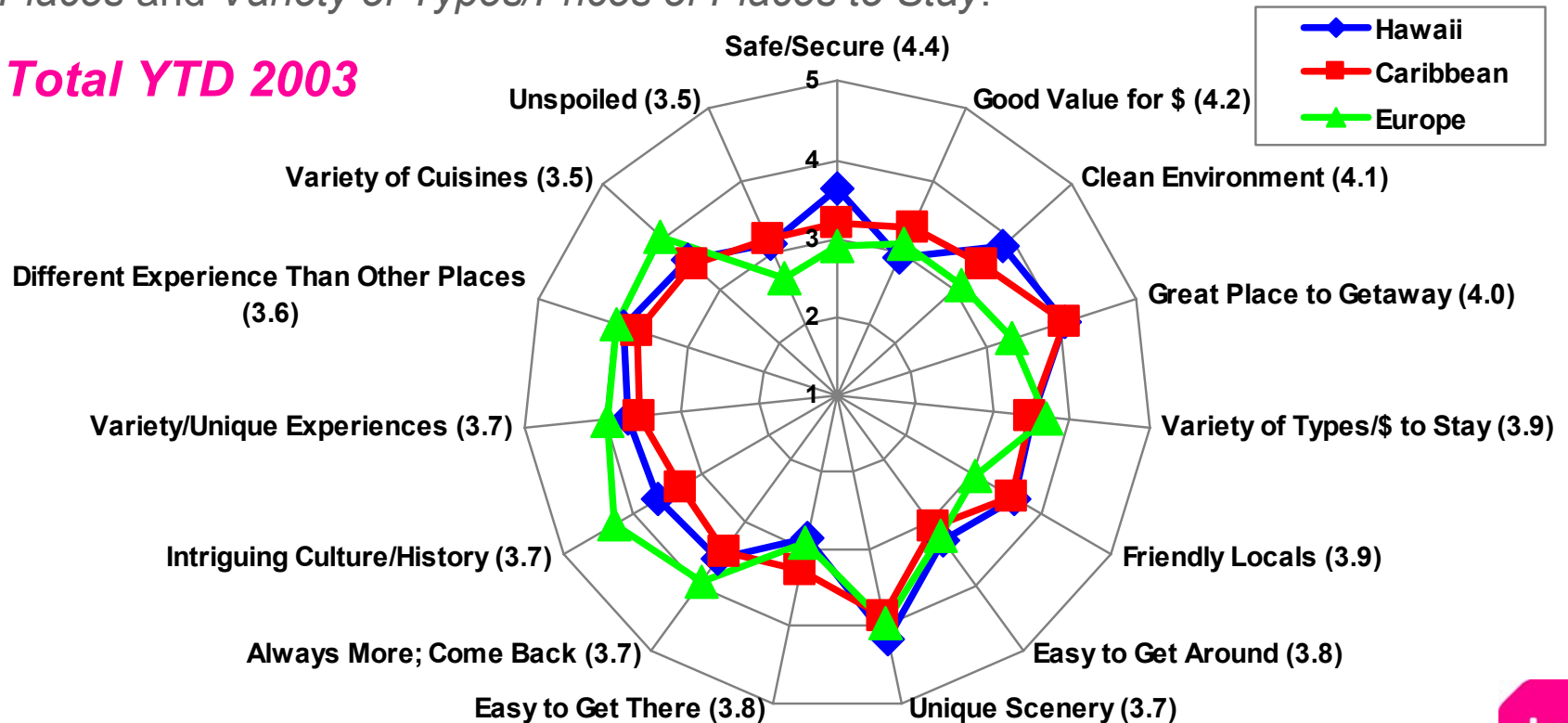
## Total YTD 2003



# Eastern US Market: (Gap) Hawaii/ Caribbean/Europe (Q5)

Eastern US travelers rate the Caribbean and Europe quite competitively to Hawaii. **Hawaii** clearly tops them on *Safe/Secure Place*, *Clean Environment*, and edges ahead on *Unique Scenery*; the **Caribbean** ranks higher on *Easy to Get There* and *Good Value for the Money*; **Europe** outpaces others on *Always More to Come Back For*, *Intriguing History & Culture*, *Variety/Unique Experiences*, and *Variety of Cuisines*. **Europe** also exhibits a modest lead on *Different Experience Than Other Places* and *Variety of Types/Prices of Places to Stay*.

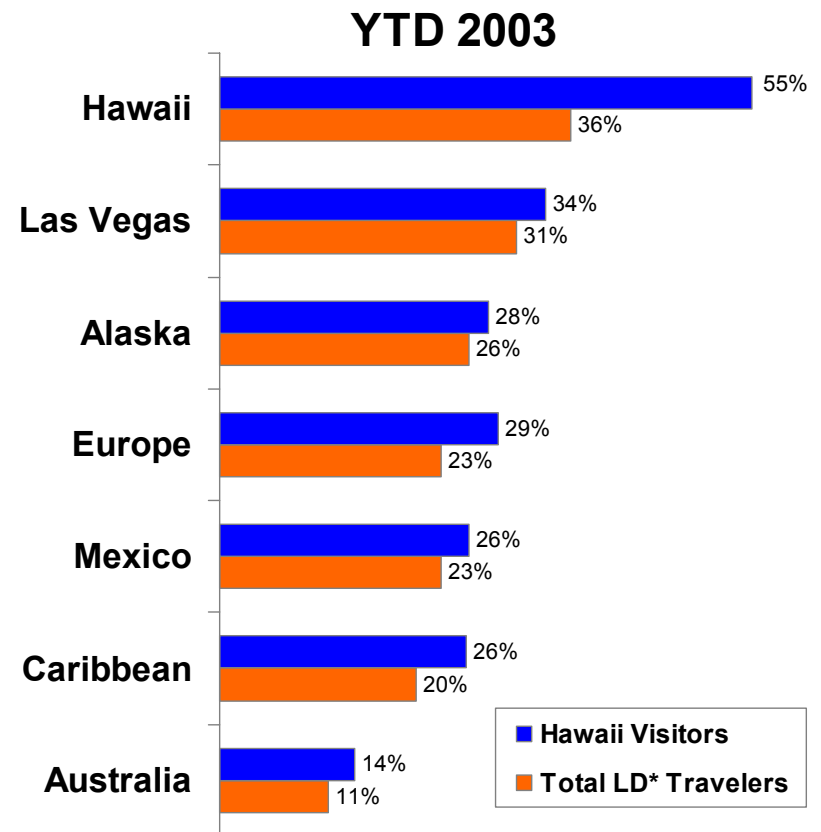
## Total YTD 2003



***Western US Market:  
Demographics and Travel Patterns***

# Western US Market: Considered Destinations (Q3)

- With only marginal differences in rank order, the top destinations considered by Western US 500+ mile air travelers are similar to travelers who have visited Hawaii.
- However, Hawaii visitors (past 3 years) are more likely to choose each of these than other travelers.

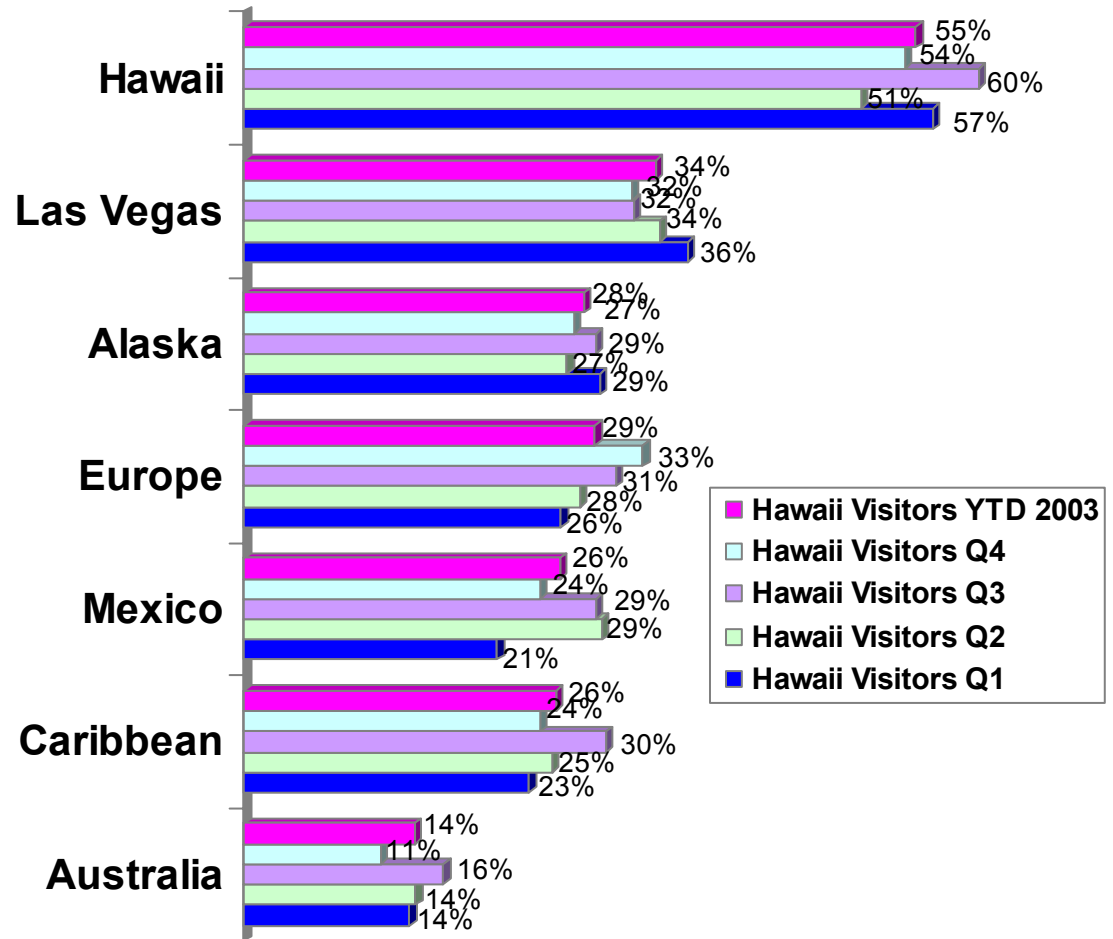


LD\* = Long-distance: 500+ mile air travelers



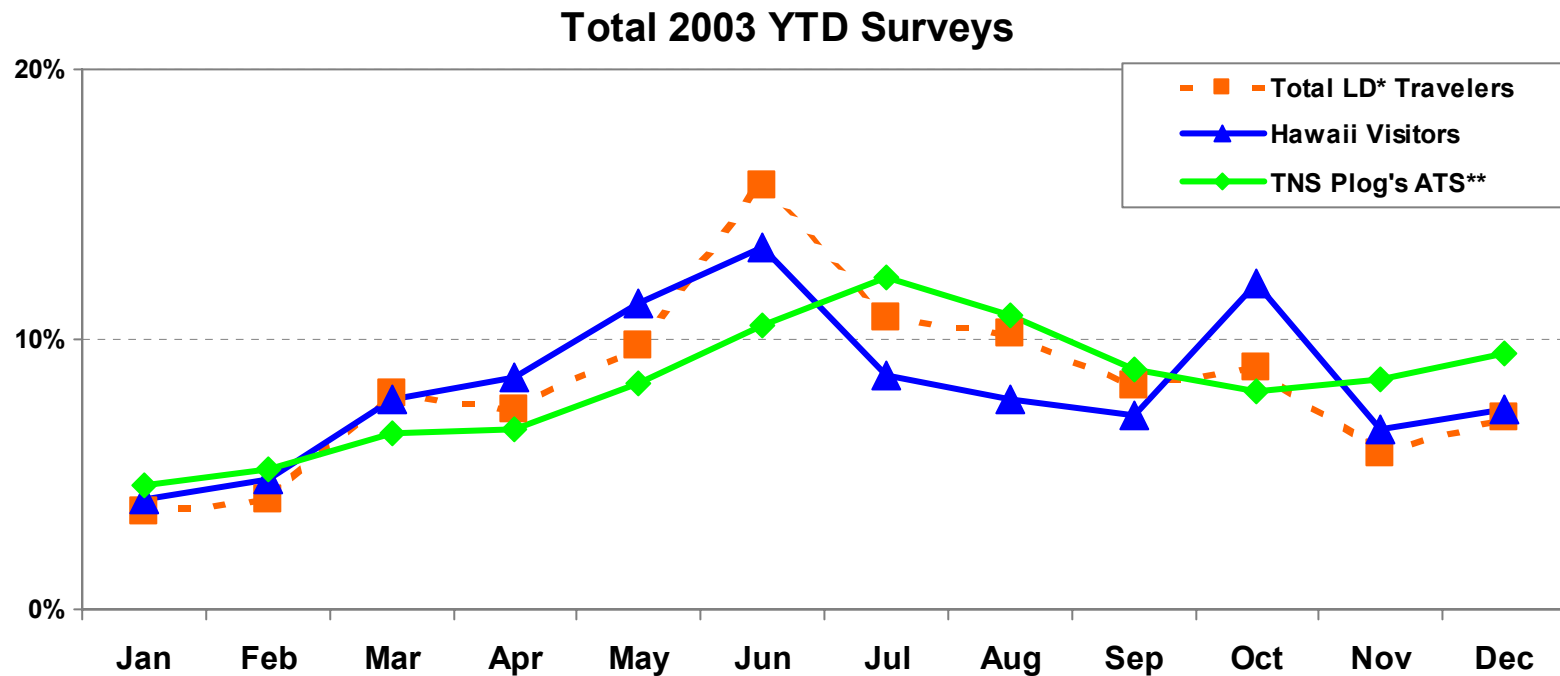
# Western US Market: Considered Destinations (Q3)

- Among past visitors, Hawaii is always at the top of the list and more than half (55%) consider it a destination to visit again.
- Most of the destinations hover near their midpoint over the four quarters, but Europe shows a steadily strengthening pattern and Las Vegas tends to decline.



# Western US Market: Timing of Next Vacation (Q4)

In the Western US Market, 2003 Hawaii visitors and total LD\* travelers follow a similar pattern as US travelers in general (from TNS Plog's American Traveler Survey), except that Western US Hawaii visitors and LD\* travelers are more likely to take trips in Spring and both peak a month earlier (in June).

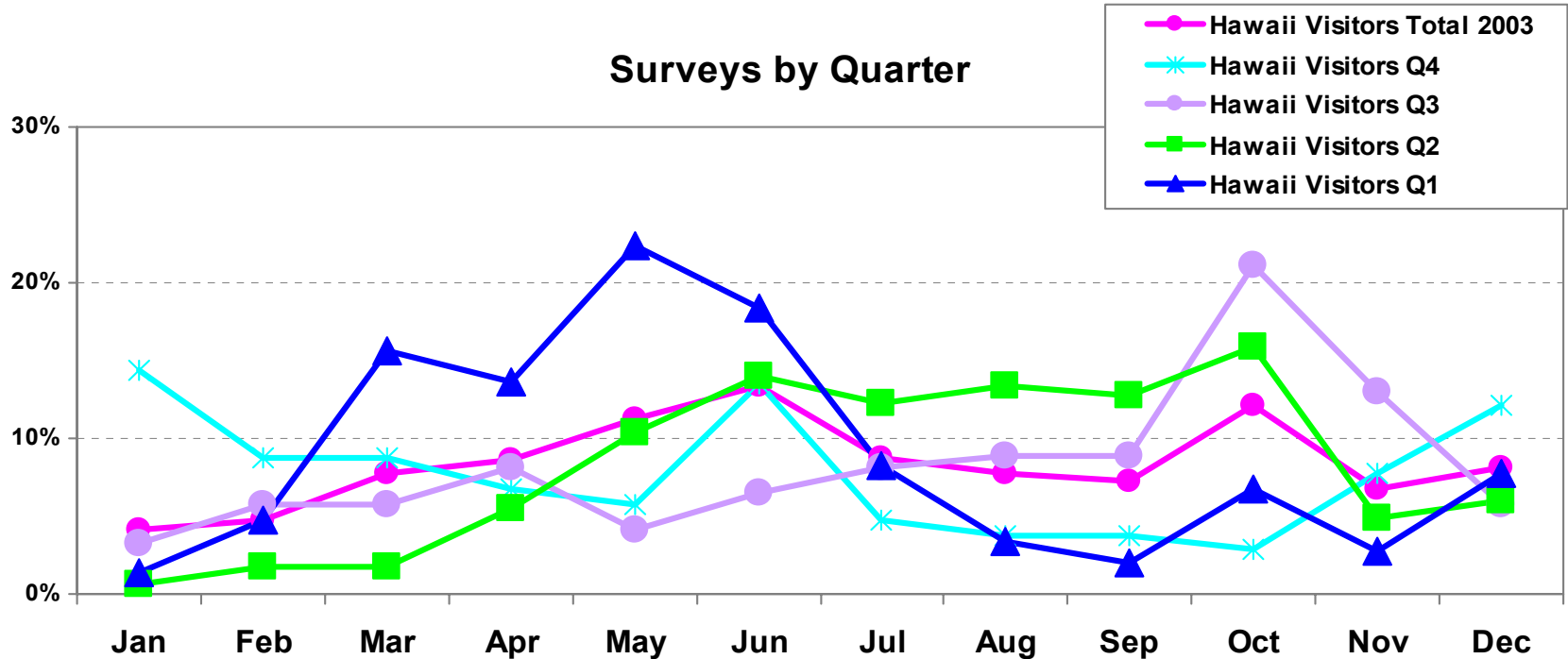


LD\* = Long-distance: 500+ mile air travelers

ATS\*\* = TNS Plog Research's 2003 American Traveler Survey, proportion of trips by month

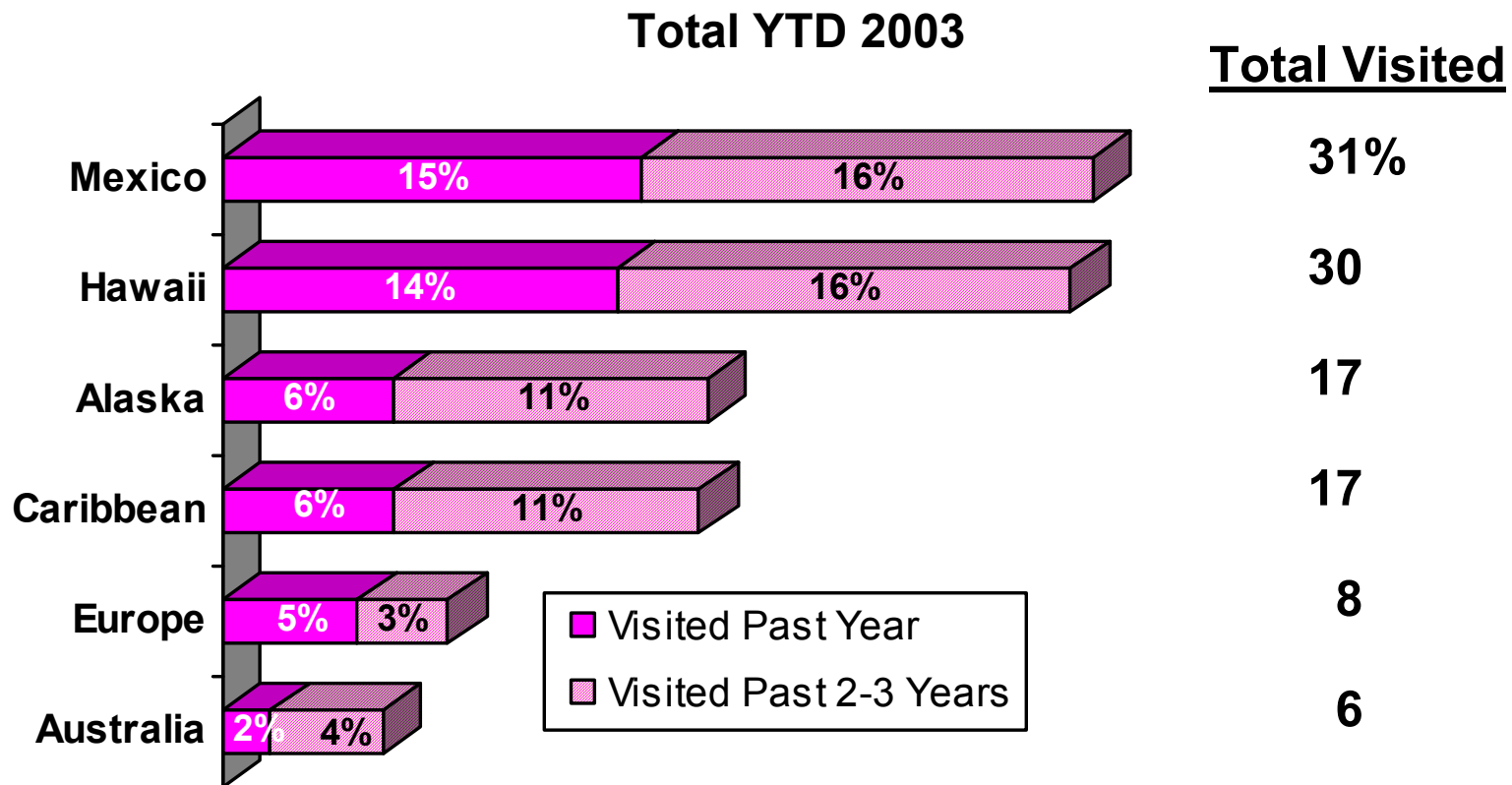
# Western US Market: Timing of Next Vacation (Q4)

Each quarter, the largest proportion of Hawaii visitors expect to take their next trip soon after the survey is conducted. Over the year, timing for the next trip is more stable, peaking in May, June, and October.



# Western US Market: Destinations in Past (Q6) (Visited Past Year/Past 3 Years)

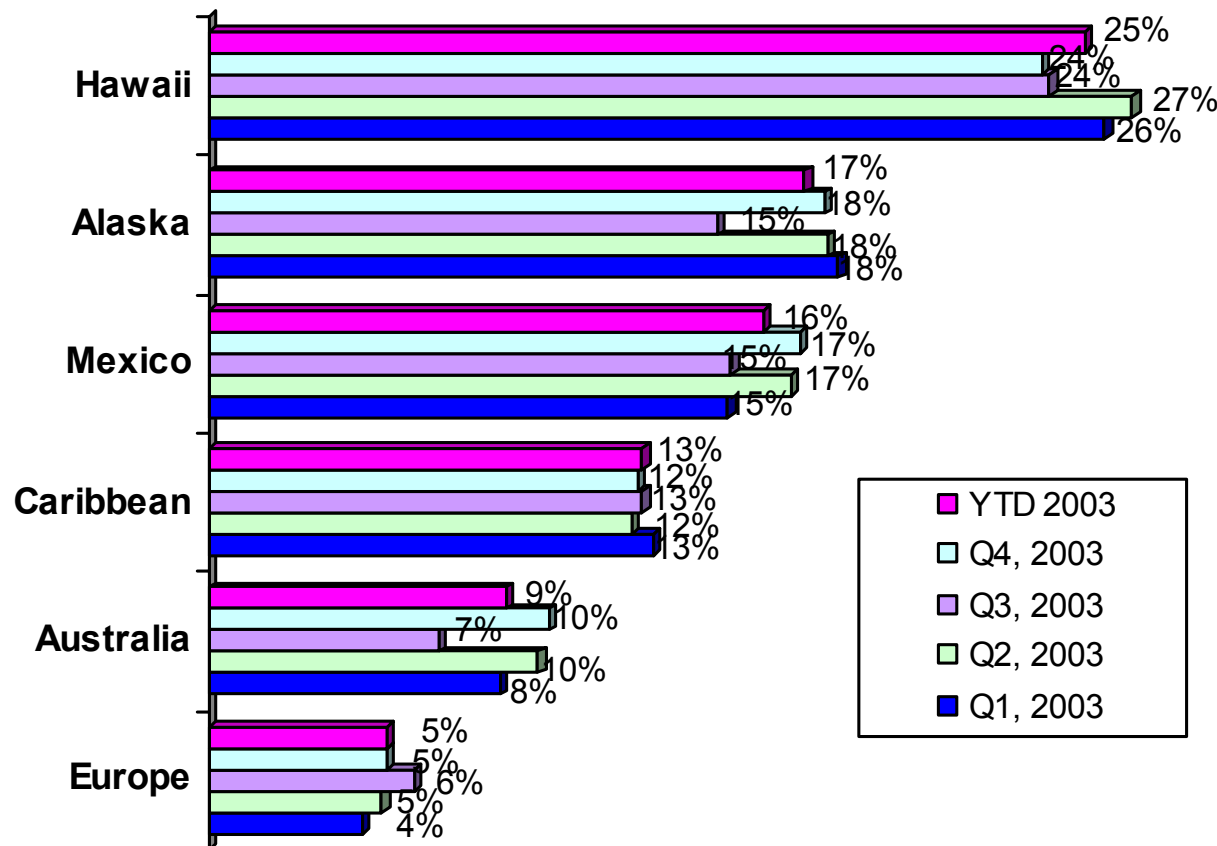
Mexico and Hawaii essentially tie for the lead among destinations most likely visited by these US travelers from the West. The Caribbean and Alaska attract about half as many; Europe and Australia trail.



# Western US Market: Destinations Planned (Q6)

## (Plan to Visit for Leisure Within 24 Months)

When long-distance travelers choose destinations for trips that they plan to take within 2 years, Hawaii consistently ranks first; Alaska and Mexico compete for second place. Limited variation appears by quarter.

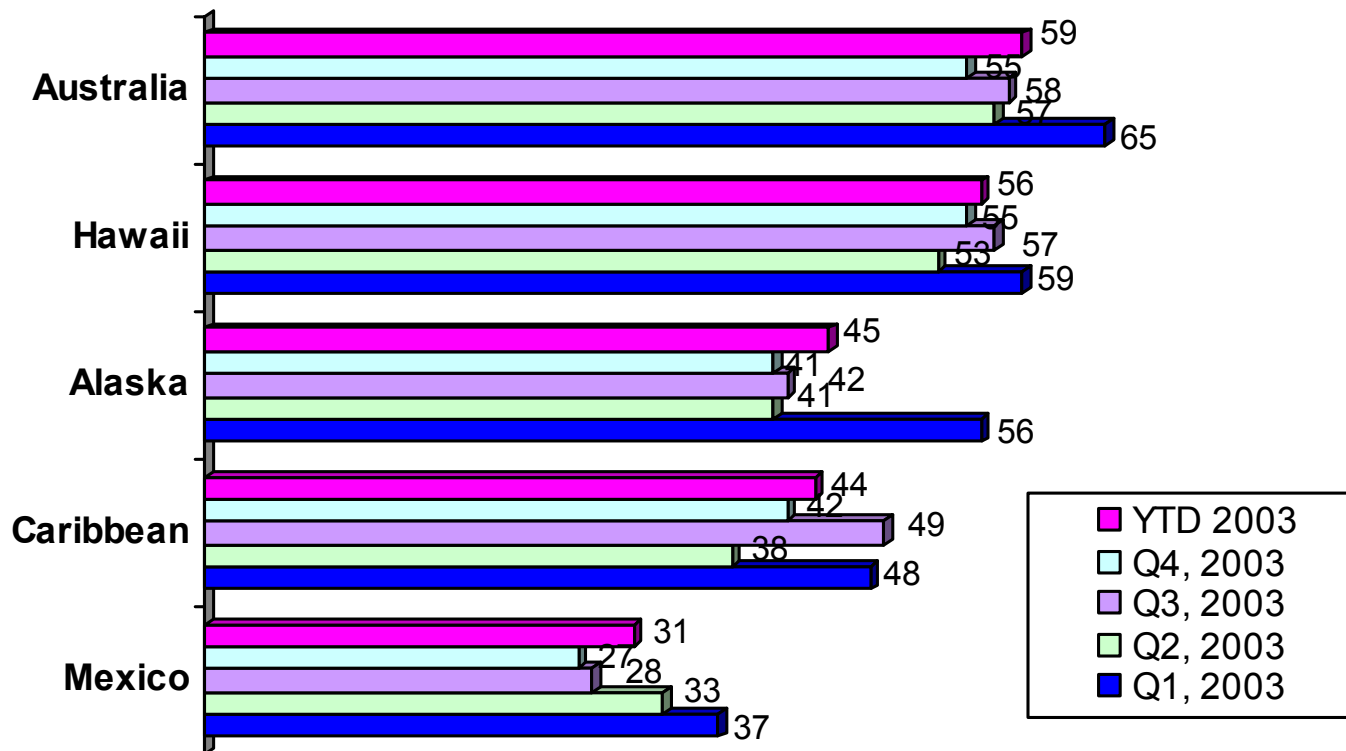


# Satisfaction Index (Q6)

## (Western US: Especially Like/Have Visited)

Hawaii receives high marks for satisfying its visitors among Western travelers also, but falls just slightly short of Australia for the year. Hawaii and Australia vie for the lead from quarter to quarter; each providing superior vacation experiences.

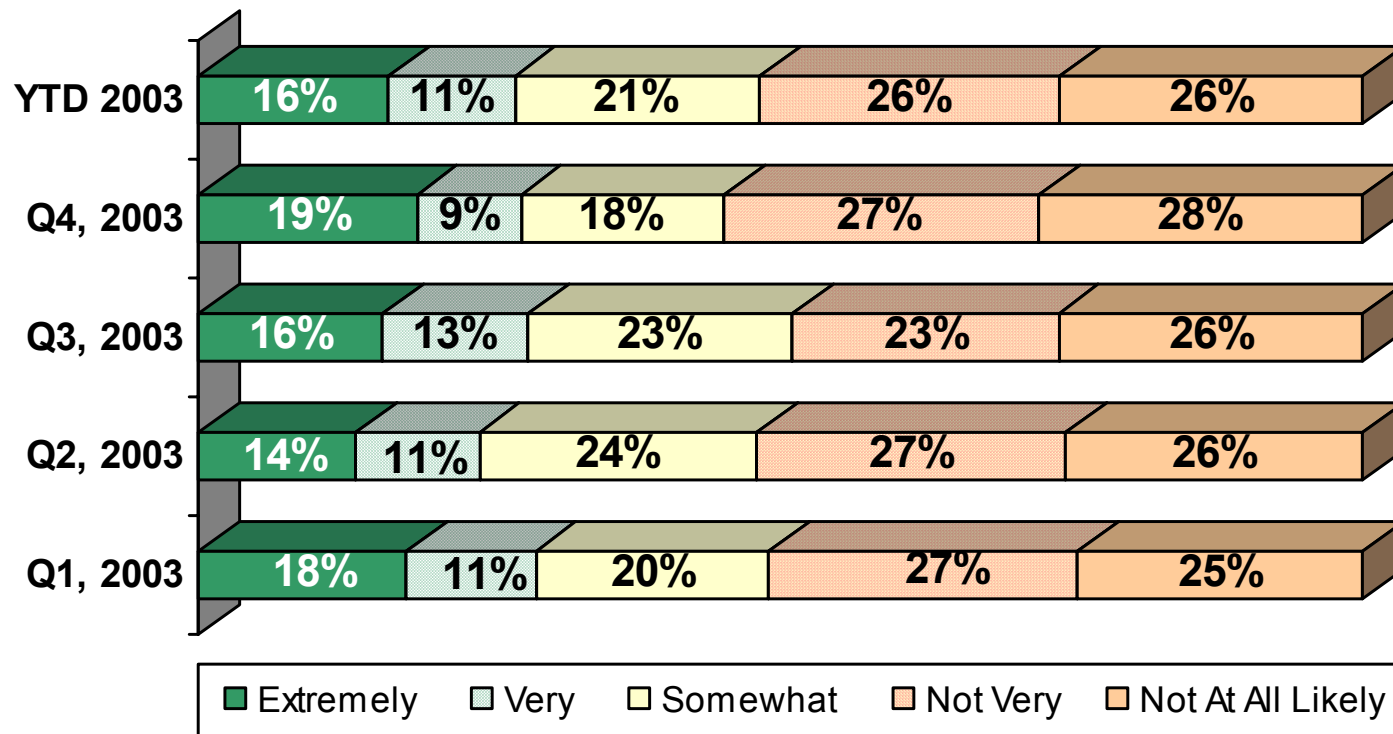
### Hawaii Satisfaction: Western US



# Western US Market:

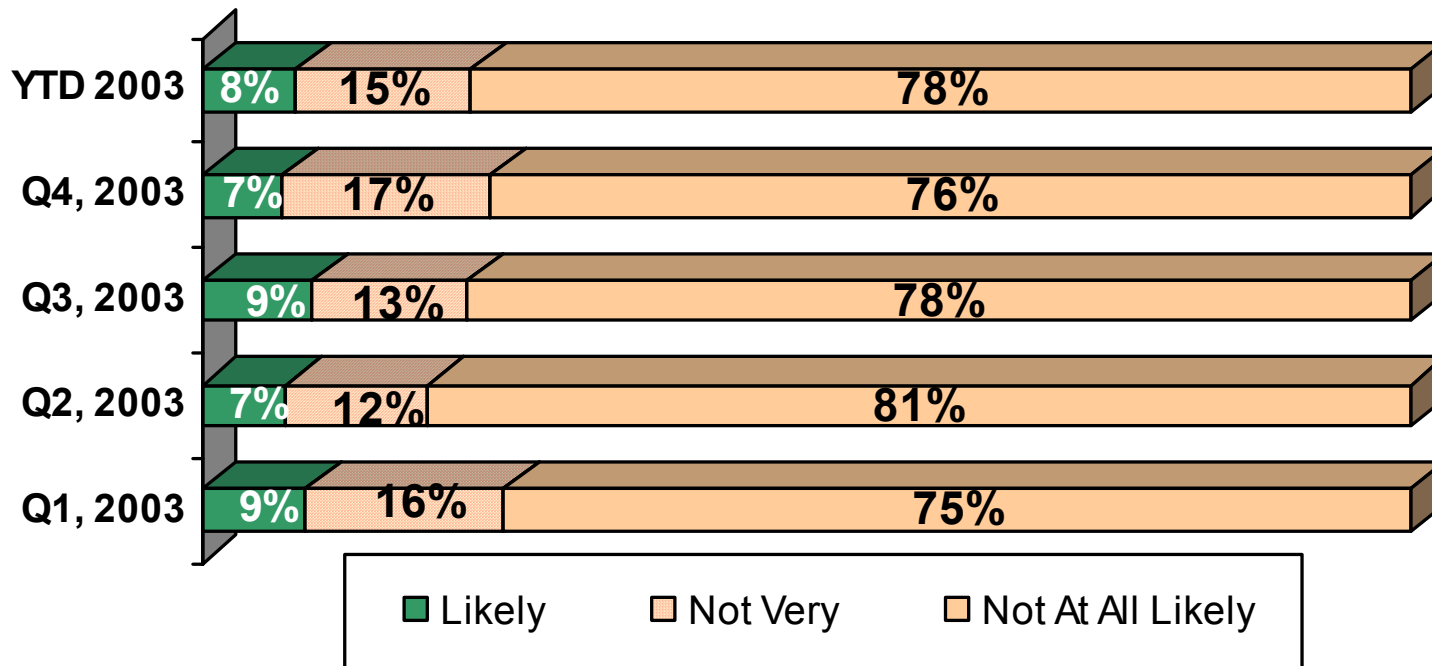
## Likely to Visit Hawaii FOR LEISURE (Q14)

Twice as many (27%) Western US travelers expect (*very/ extremely likely*) to visit Hawaii as those from the East (13%). However, Hawaii faces the same challenges in enticing Western US travelers to visit in the next 24 months; specifically, distance and time (it is still a relatively long flight), cost, and competitor destinations.



# Western US Market: Likely to Visit Hawaii FOR BUSINESS (Q15)

Somewhat higher than for the Eastern US Market, Hawaii remains an infrequent business destination choice (next 24 months).





***Western US Market:  
Hawaii Specific Evaluations***

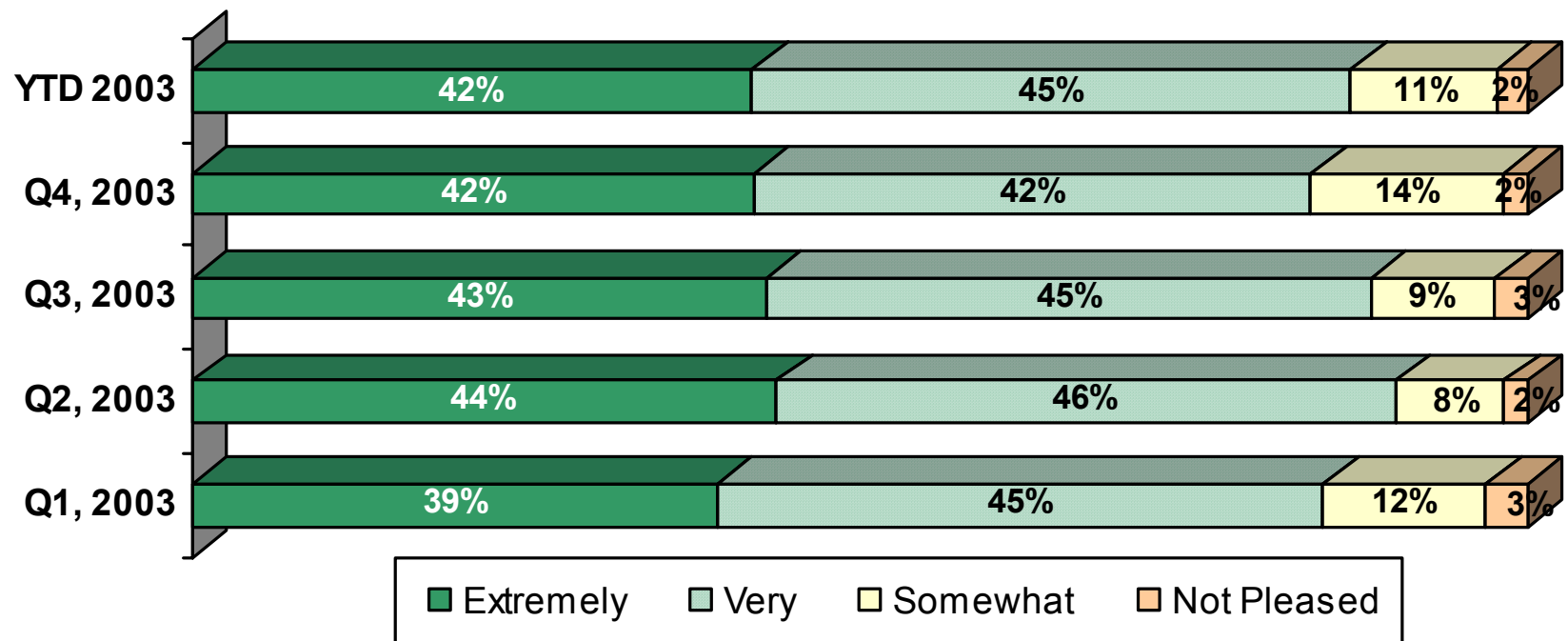
# Western US Market: Hawaii Visitation (Q7)

Nearly two-thirds of Western US 500+ mile air travelers have visited Hawaii in the past. Although the proportion drops by half (63% to 30%) when looking at the visitation in the past three years, it is between 2 and 3 times higher than the Eastern Market (30% vs. 14%). Meanwhile, the average number of visits increases with more recent visitation.

	Visited Hawaii				
	2003 YTD	W1: Jan-Mar:	W2: Apr-Jun:	W3: Jul-Sept	W4: Oct-Dec
<b>Total Western Market (Base)</b>	<b>1,908</b>	<b>499</b>	<b>524</b>	<b>457</b>	<b>428</b>
<b>% Ever Visited Hawaii</b>	<b>63%</b>	<b>65%</b>	<b>65%</b>	<b>62%</b>	<b>62%</b>
<b>Average # of Trips to Hawaii</b>	<b>4.2</b>	<b>4.4</b>	<b>4.7</b>	<b>3.9</b>	<b>3.7</b>
<b>% Visited Hawaii Past 3 Years</b>	<b>30</b>	<b>32</b>	<b>33</b>	<b>29</b>	<b>26</b>
<b>Average # of Trips to Hawaii</b>	<b>5.7</b>	<b>5.9</b>	<b>6.3</b>	<b>5.3</b>	<b>5.0</b>
<b>% Visited Past Year</b>	<b>14</b>	<b>14</b>	<b>15</b>	<b>15</b>	<b>12</b>
<b>Average # of Trips to Hawaii</b>	<b>6.7</b>	<b>7.6</b>	<b>6.9</b>	<b>6.0</b>	<b>6.1</b>

# Western US Market Hawaii Visitors: How Pleased With Last Visit (Q13) (Ever Visited)

Western visitors rate Hawaii highly in its ability to please, but lower than visitors from the East. In the West, respondents tend to select *very* rather than *extremely* pleased, but similar proportions choose one of these two most positive options (87% from the West, 88% from the East during 2003).

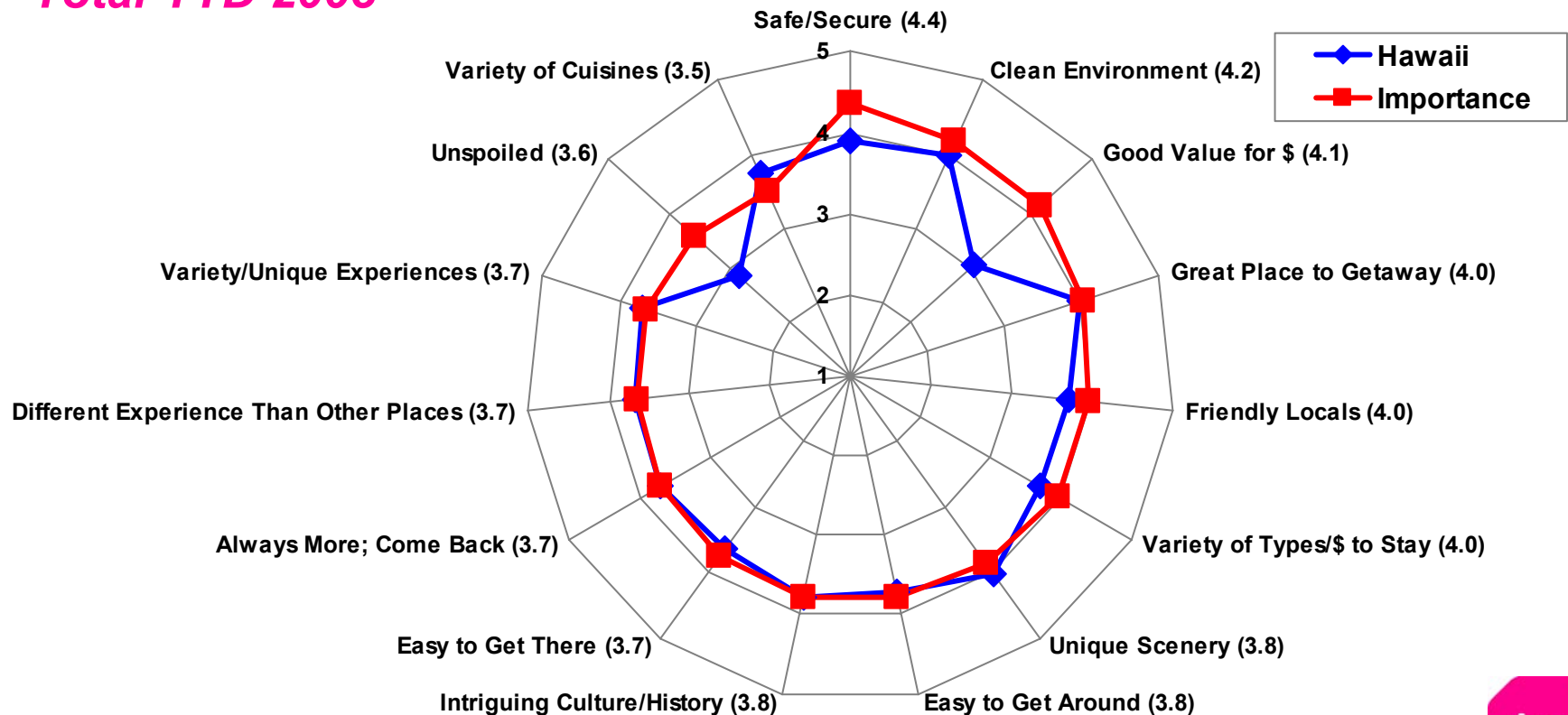


***Western US Market:  
Importance of Attributes and Ratings of  
Hawaii vs. Competitive Destinations***

# Western US Market: Importance/Ratings (Q5)

Western travelers generally assign high scores to the Hawaii experience, except for *Good Value for the Money* and *Unspoiled*. They also perceive a noticeable gap between importance and Hawaii's "delivery" on *safe/secure*.

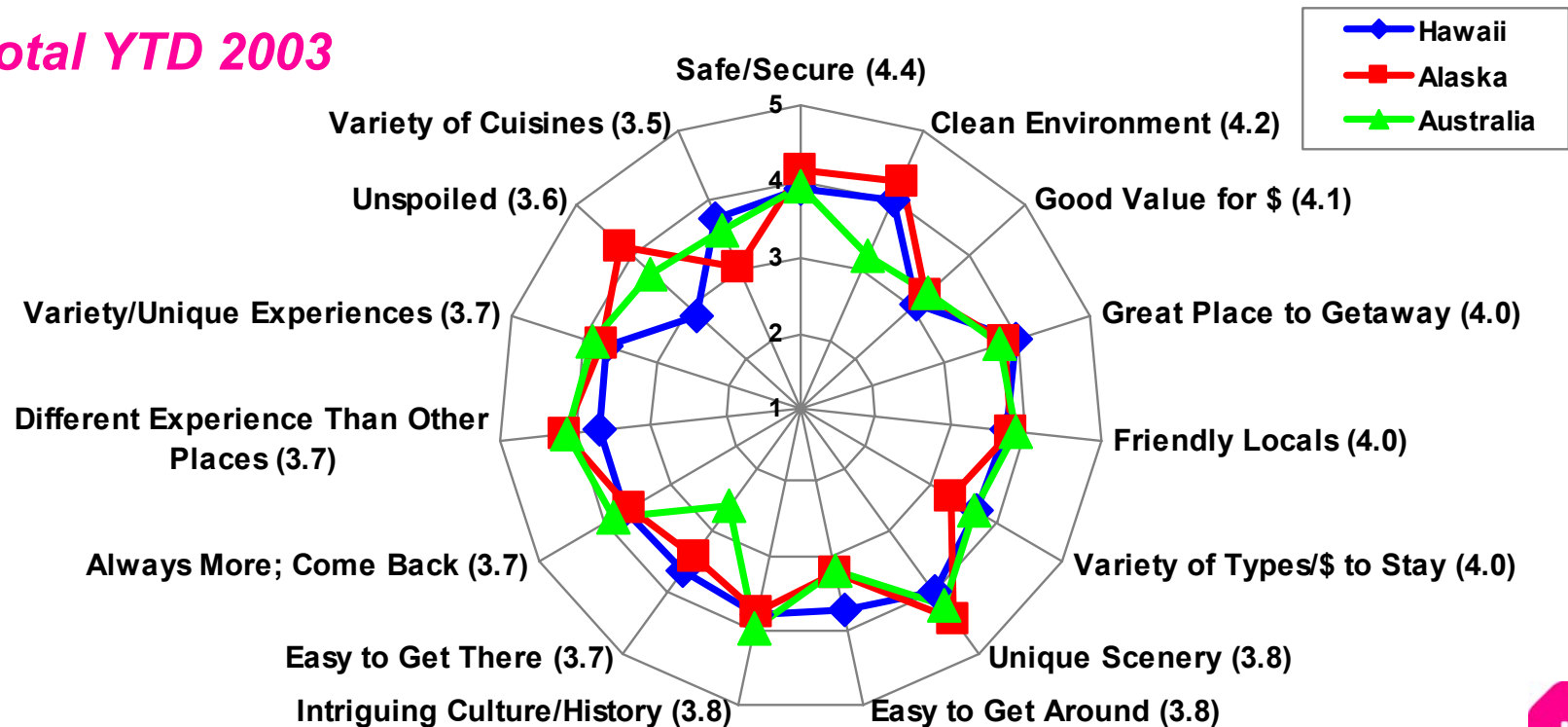
## Total YTD 2003



# Western US Market: (Gap) Hawaii/Alaska/Australia (Q5)

**Hawaii** clearly leads on three items: *Easy to Get Around*, *Easy to Get There*, and *Variety of Cuisines*. **Alaska** wins for *Safe/Secure*, *Clean Environment*, *Unique Scenery*, and *Unspoiled*; **Australia** pulls ahead on *Intriguing Culture/History* and *Variety/Unique Experiences*, and *Always More to Keep Coming Back* but, logically, trails on *Easy to Get There*.

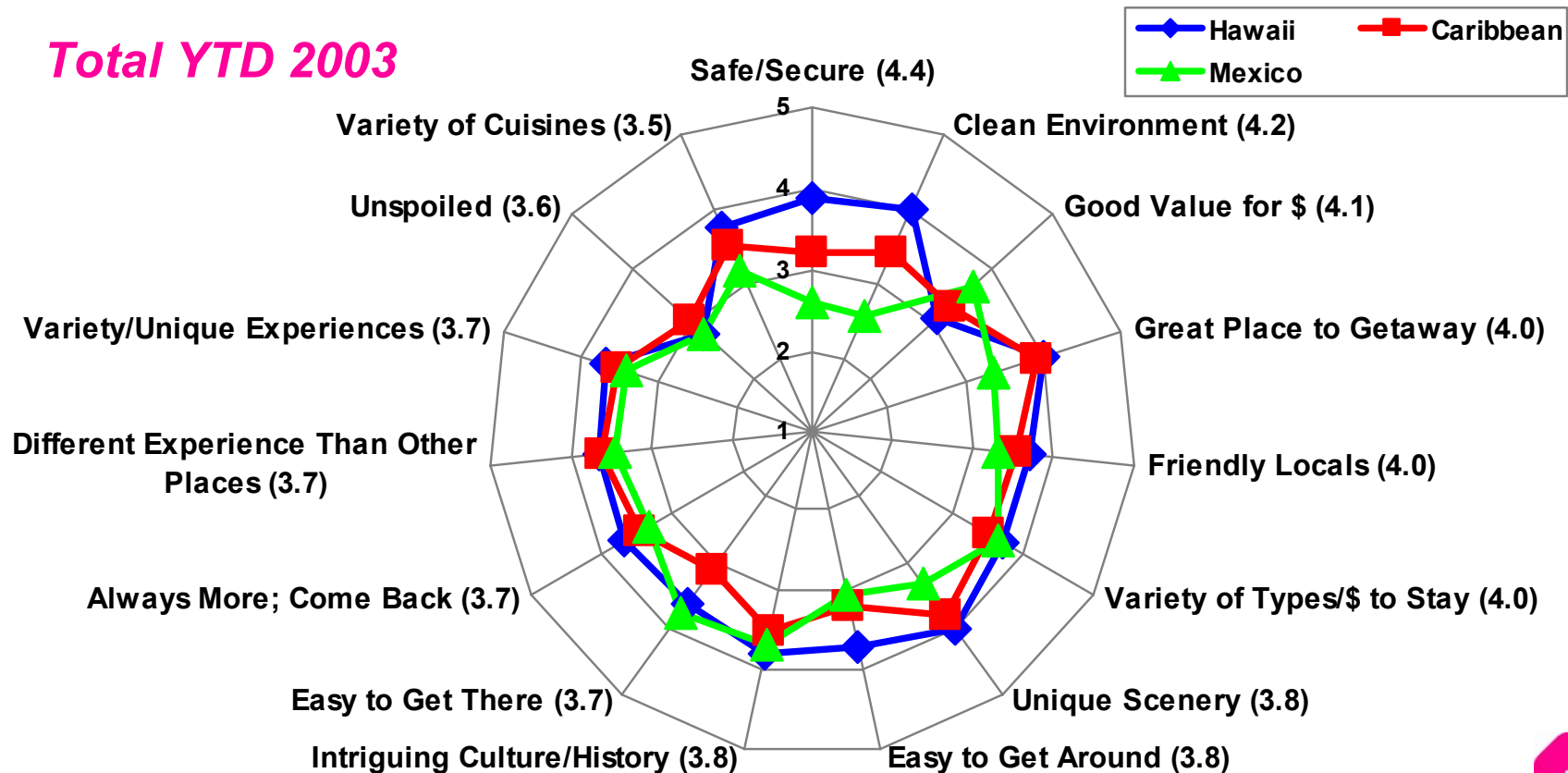
## Total YTD 2003



# Western US Market: (Gap) Hawaii/Caribbean/Mexico (Q5)

These travelers generally rate **Hawaii** near or above the **Caribbean** and **Mexico** with a few exceptions. The **Caribbean** leads on *Unspoiled* (slightly), **Mexico** leads on *Easy to Get There*, and both areas lead **Hawaii** on *Good Value for the Money*.

## Total YTD 2003

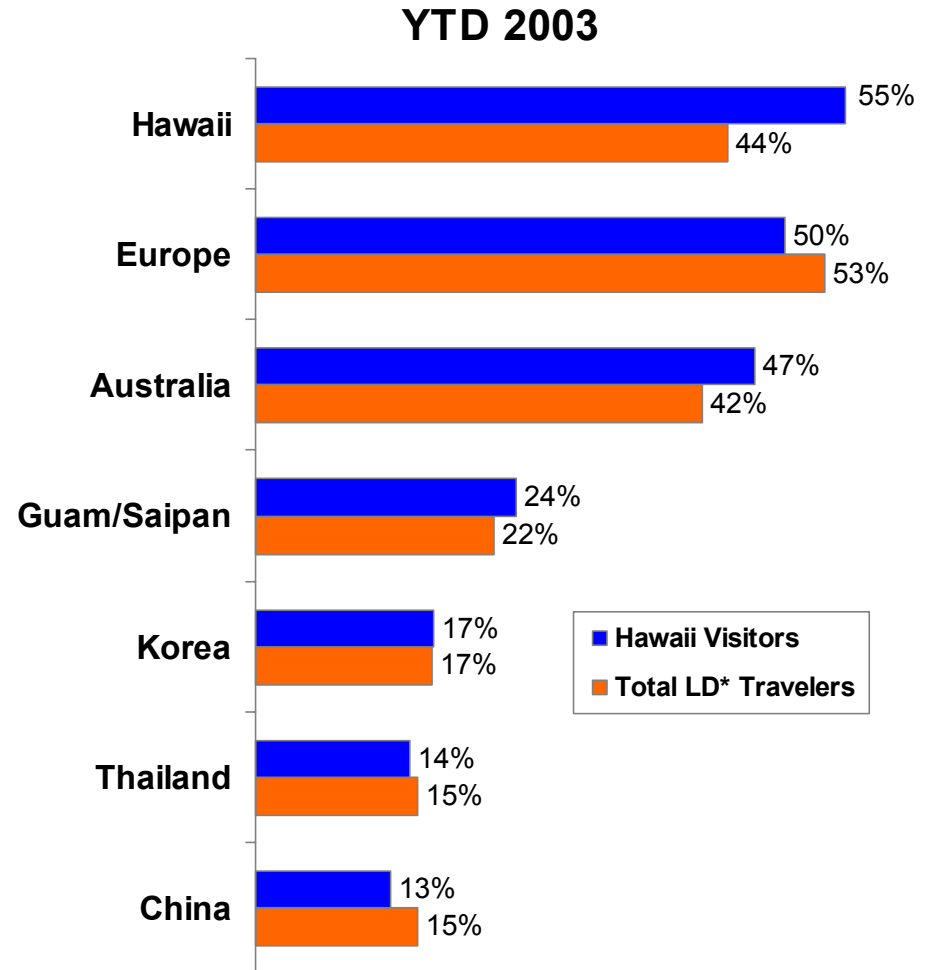


# ***Japanese Market: Demographics and Travel Patterns***



# Japanese Market: Considered Destinations (Q3)

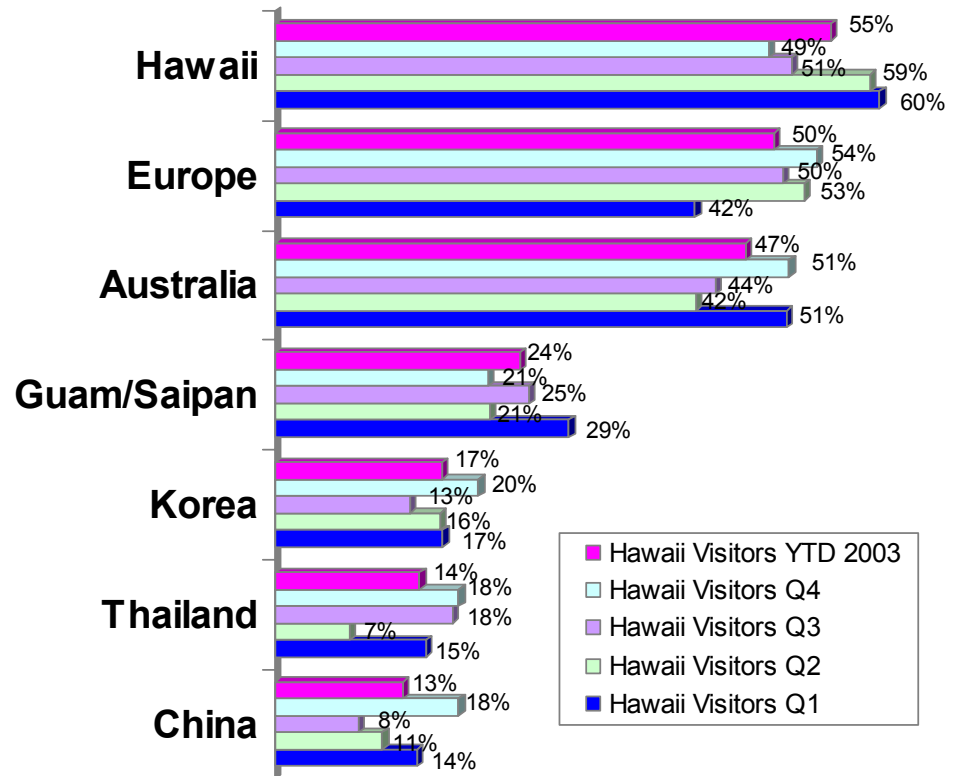
- Except for Hawaii itself, the top destination choices of Japanese international travelers vary little by whether they have visited Hawaii or not.
- Those who have been there (Hawaii) want to return, but Europe and Australia are nearly as appealing to them. Europe is the top ranked destination among total international travelers; for them, Hawaii and Australia vie for second place.



LD\* = Long-distance: 500+ mile air travelers

# Japanese Market: Considered Destinations (Q3)

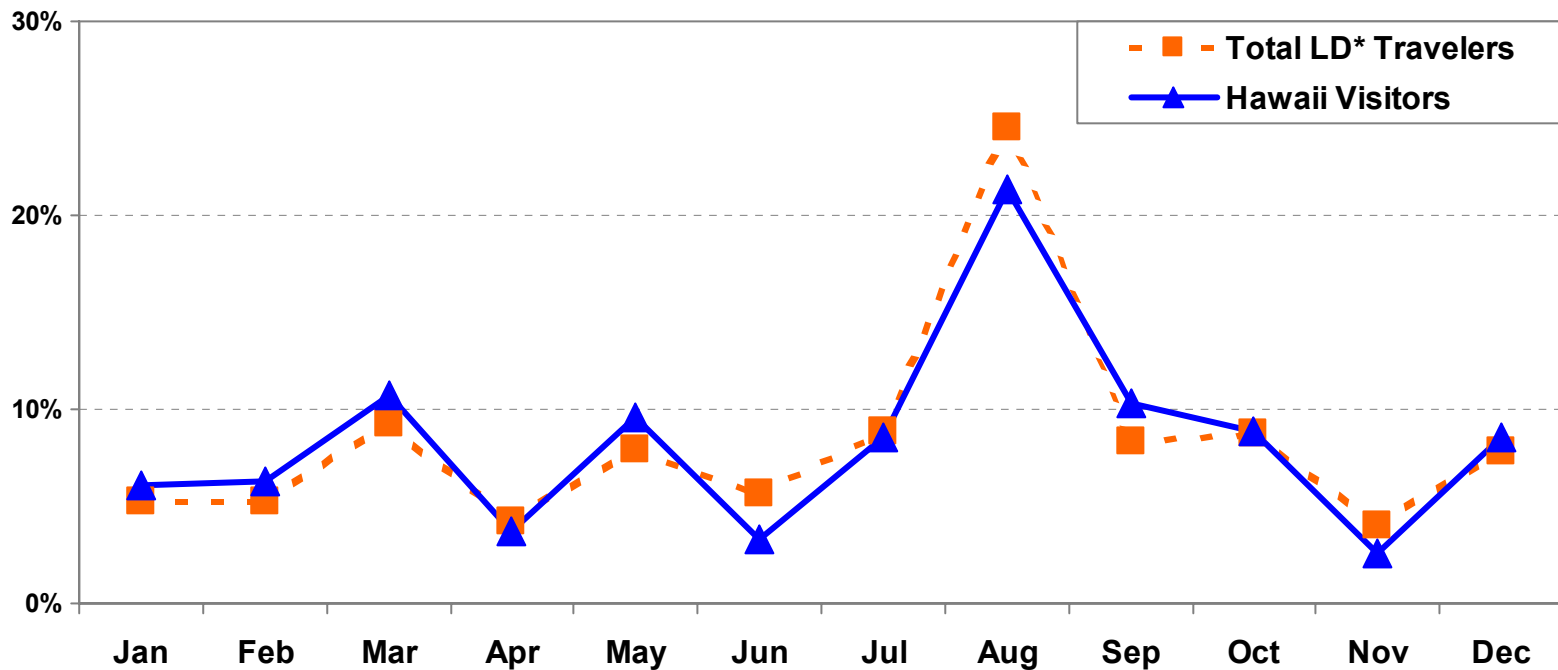
- Prior visitors place Hawaii at the top of the list among considered destinations for future vacations.
- However, the proportion that select it deteriorates each quarter and warrants continued monitoring.
- Europe and Australia remain strong competitors.
- China, Thailand, and Korea all recover from earlier dips (possibly SARS-related).



# Japanese Market: Timing of Next Vacation (Q4)

Travel behavior, for the Japanese, exhibits no major differences by Hawaii visitation -- most travel in August.

**Total 2003 YTD Surveys**

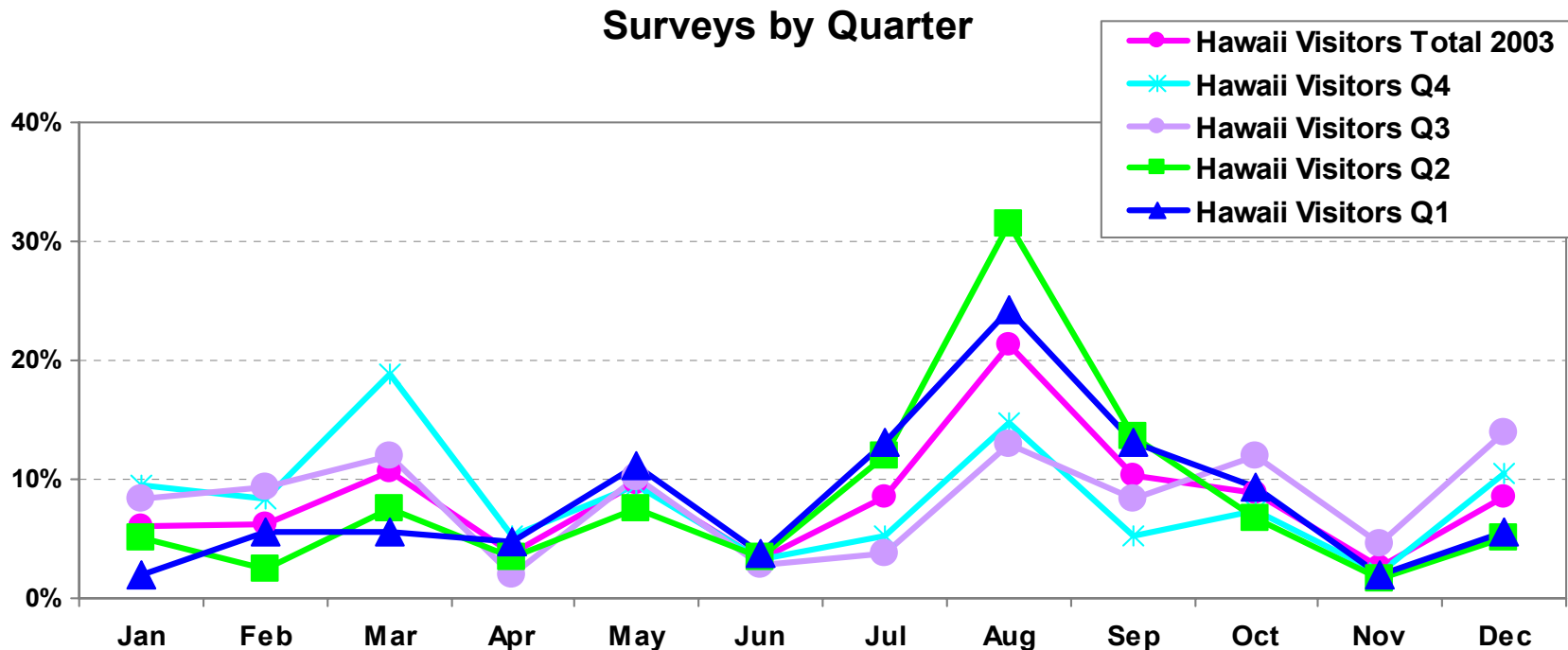


LD\* = Long-distance: 500+ mile air travelers

ATS\*\* = TNS Plog Research's 2003 American Traveler Survey, proportion of trips by month

# Japanese Market: Timing of Next Vacation (Q4)

As noted above, the primary month for vacation travel is August -- regardless of sample group or survey timing; timing has a much greater impact on US travel patterns.



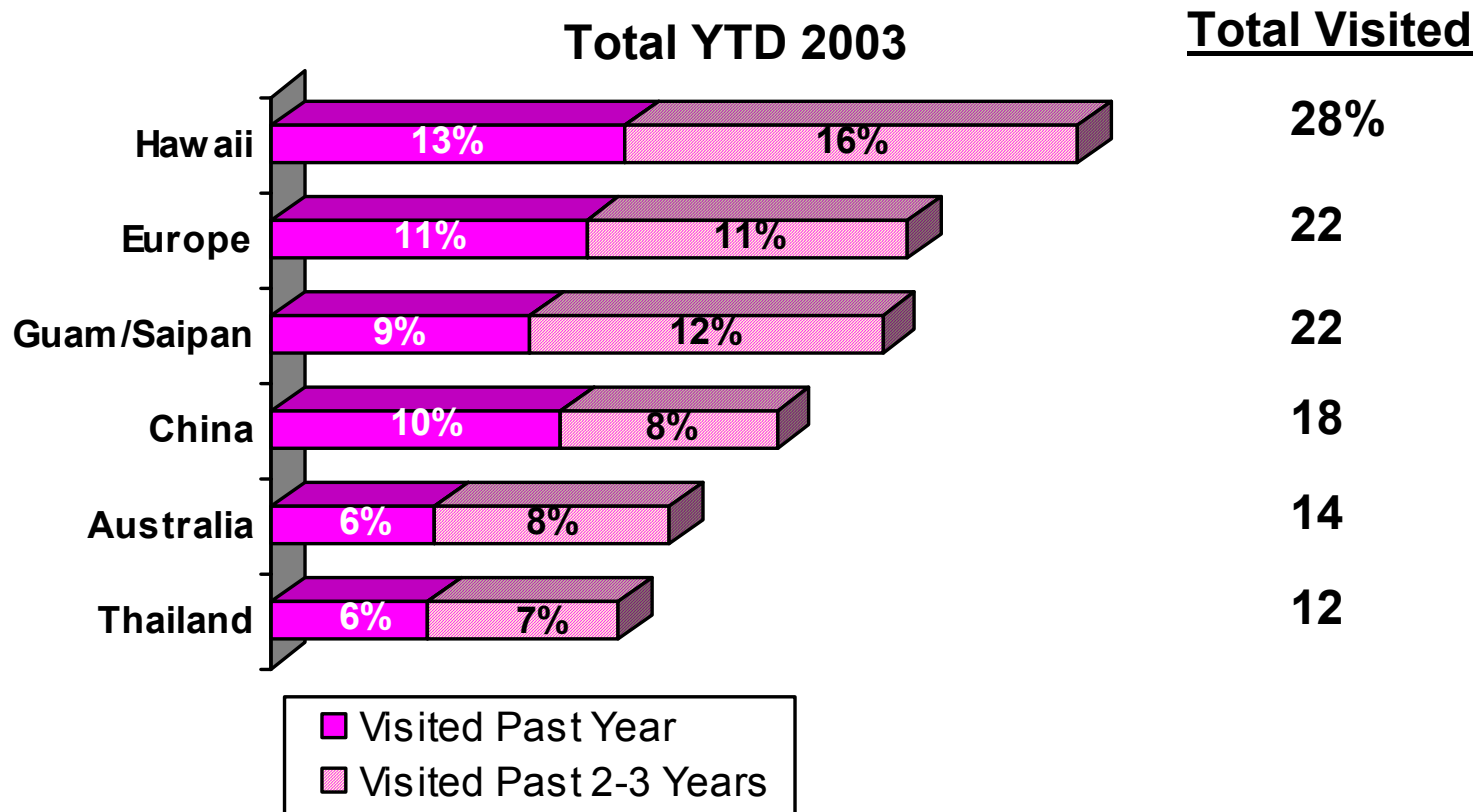
LD\* = Long-distance: 500+ mile air travelers

# Japanese Market: Destinations in Past (Q6)

## (Visited Past Year/Past 3 Years)

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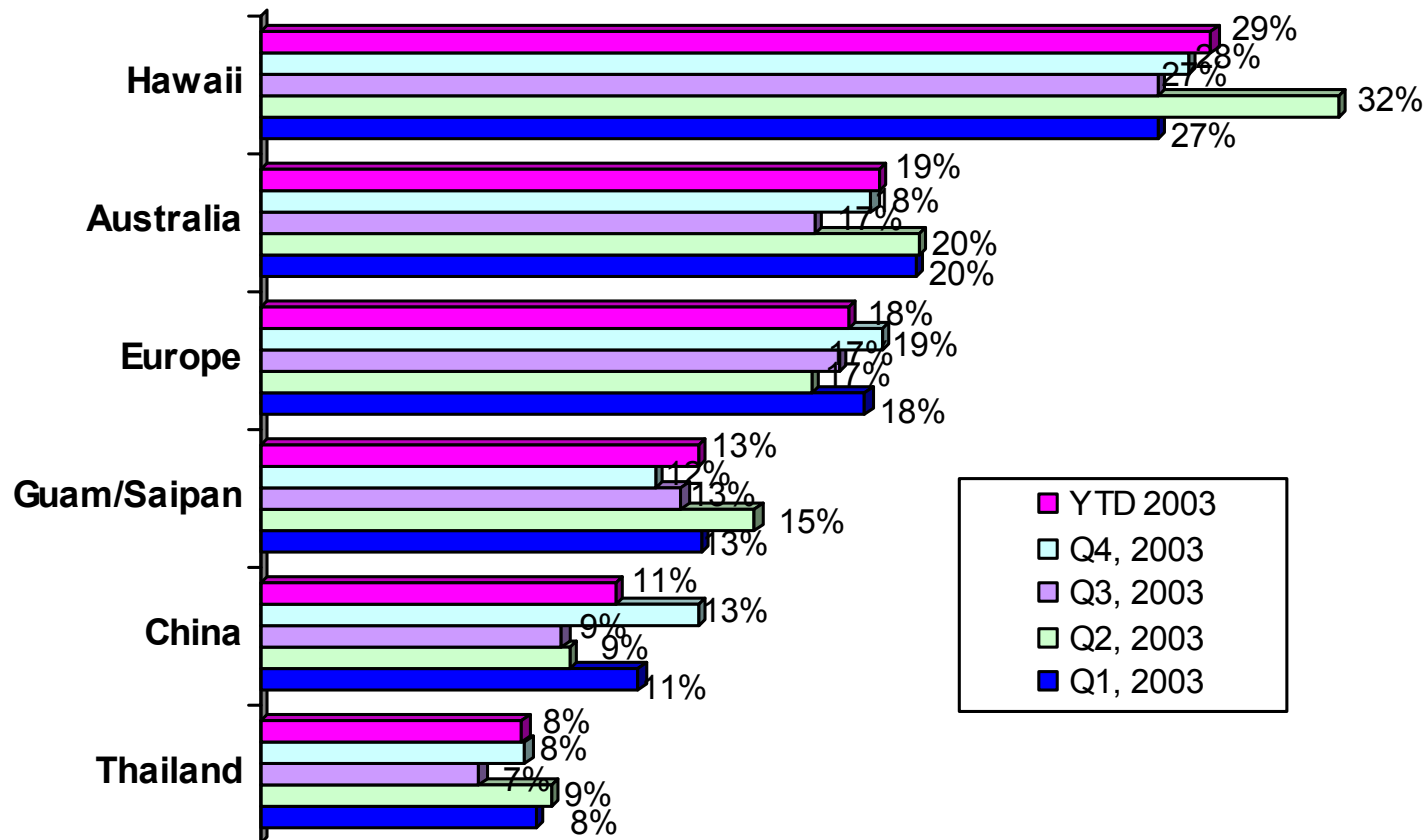
For the year, Hawaii tops the 5 listed competitive destinations visited by Japanese travelers. Europe (not a listed destination) and Guam/Saipan vie for second place.



# Japanese Market: Destinations Planned (Q6)

## (Plan to Visit for Leisure Within 24 Months)

When long-distance travelers choose destinations for trips that they plan to take within 2 years, Hawaii consistently ranks first; Australia and Europe compete for second place. Limited variation appears by quarter.

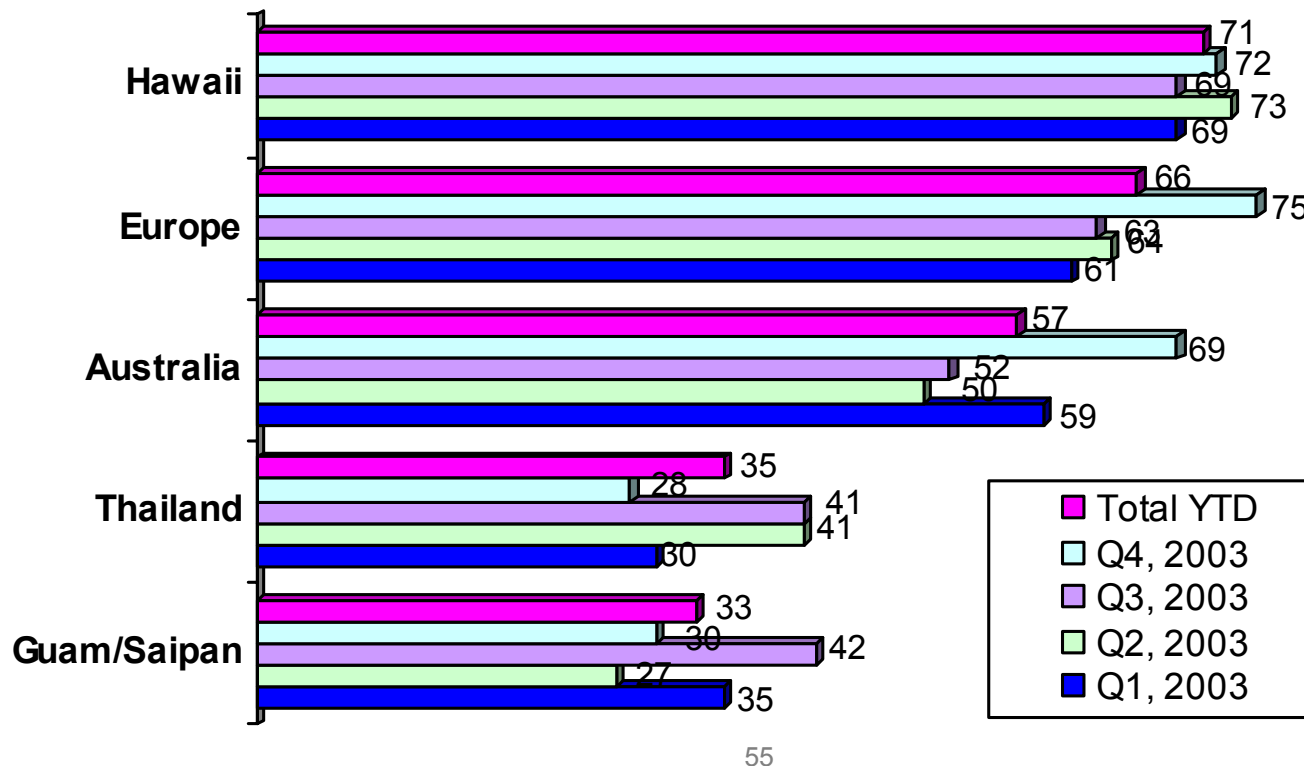


# Satisfaction Index (Q6)

## (Japan: Especially Like/Have Visited)

Over the course of the year, Japanese travelers rate Hawaii higher than all other competitors as a place they especially like. Europe ranks very competitively and leads in Quarter 4. China, not shown, ranks last (annual score of 25) among listed destinations.

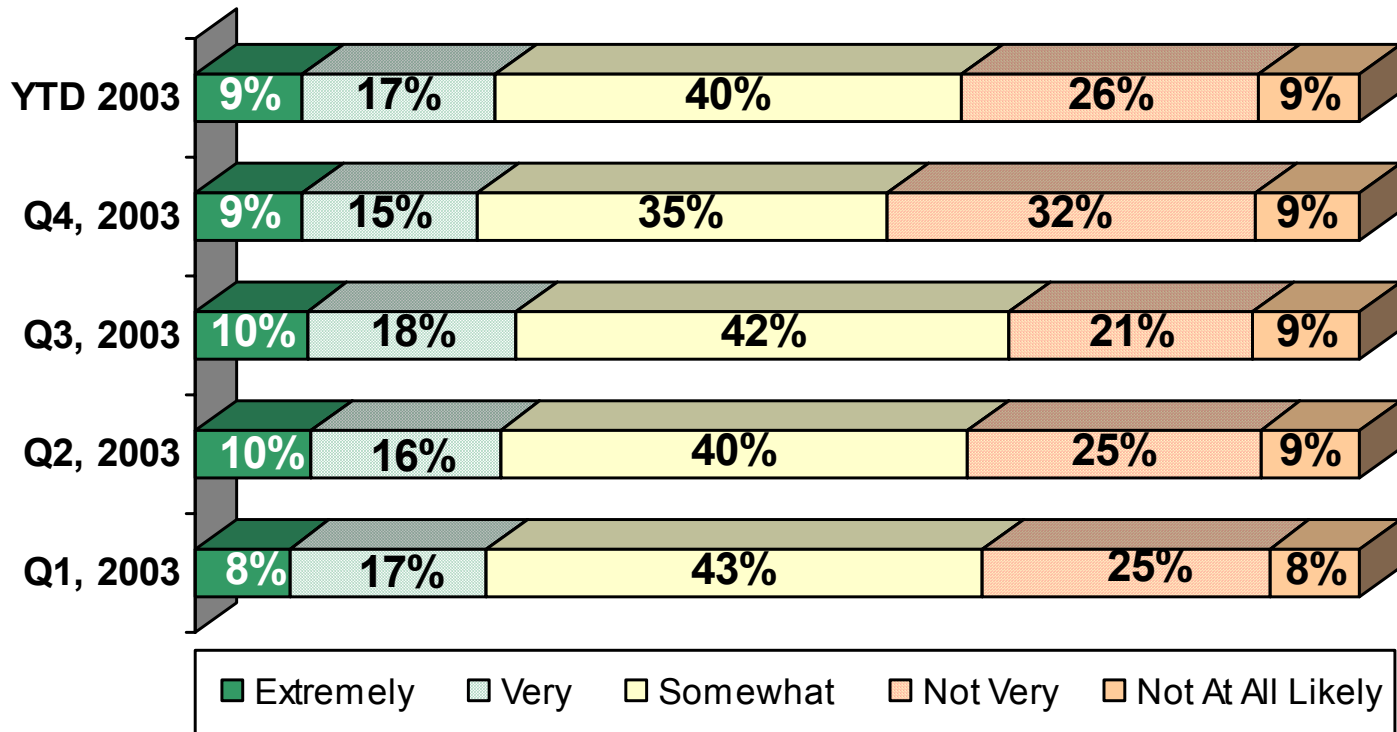
### Hawaii Satisfaction: Japan



# Japanese Market:

## Likely to Visit Hawaii FOR LEISURE (Q14)

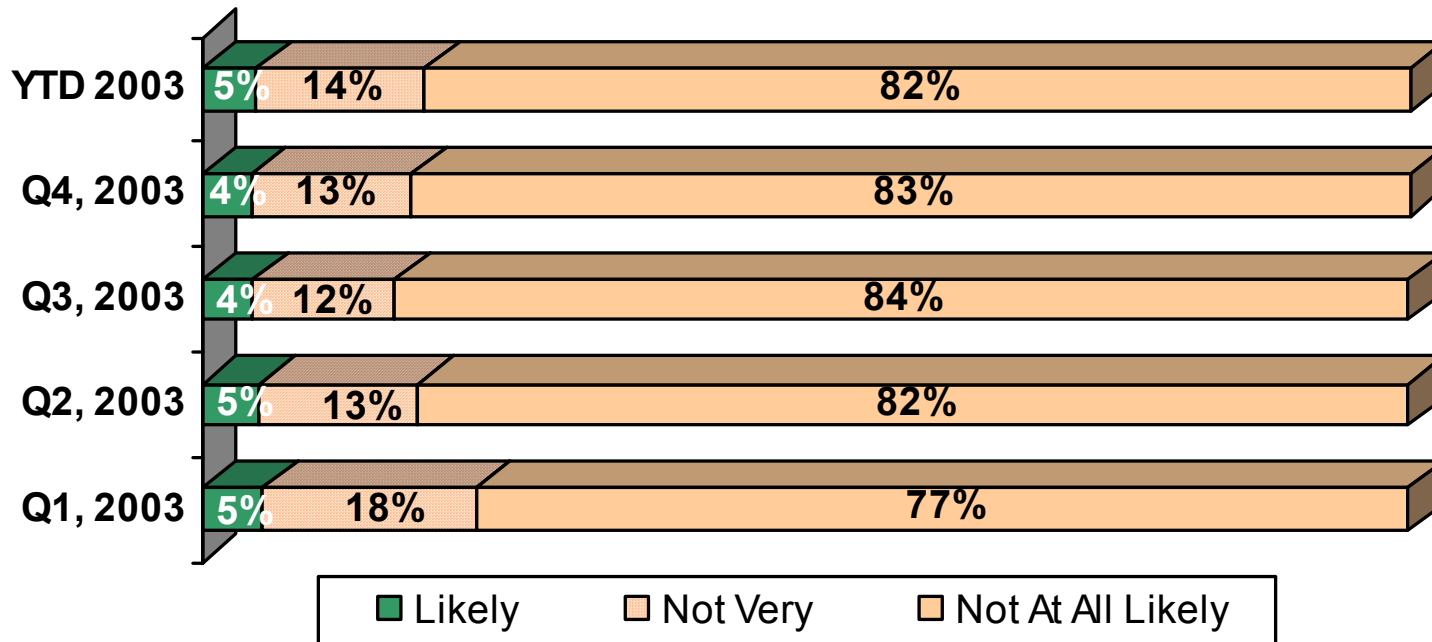
However, international Japanese travelers remain non-committal in their stated likelihood to visit in the next 24 months. Of course, Hawaii faces challenges in Japan similar to those in the US in enticing potential visitors; specifically, distance and time, cost, and competitor destinations.





# Japanese Market: Likely to Visit Hawaii FOR BUSINESS (Q15)

As in the US, Hawaii is infrequently cited as a business destination (next 24 months).



***Japanese Market:  
Hawaii Specific Evaluations***

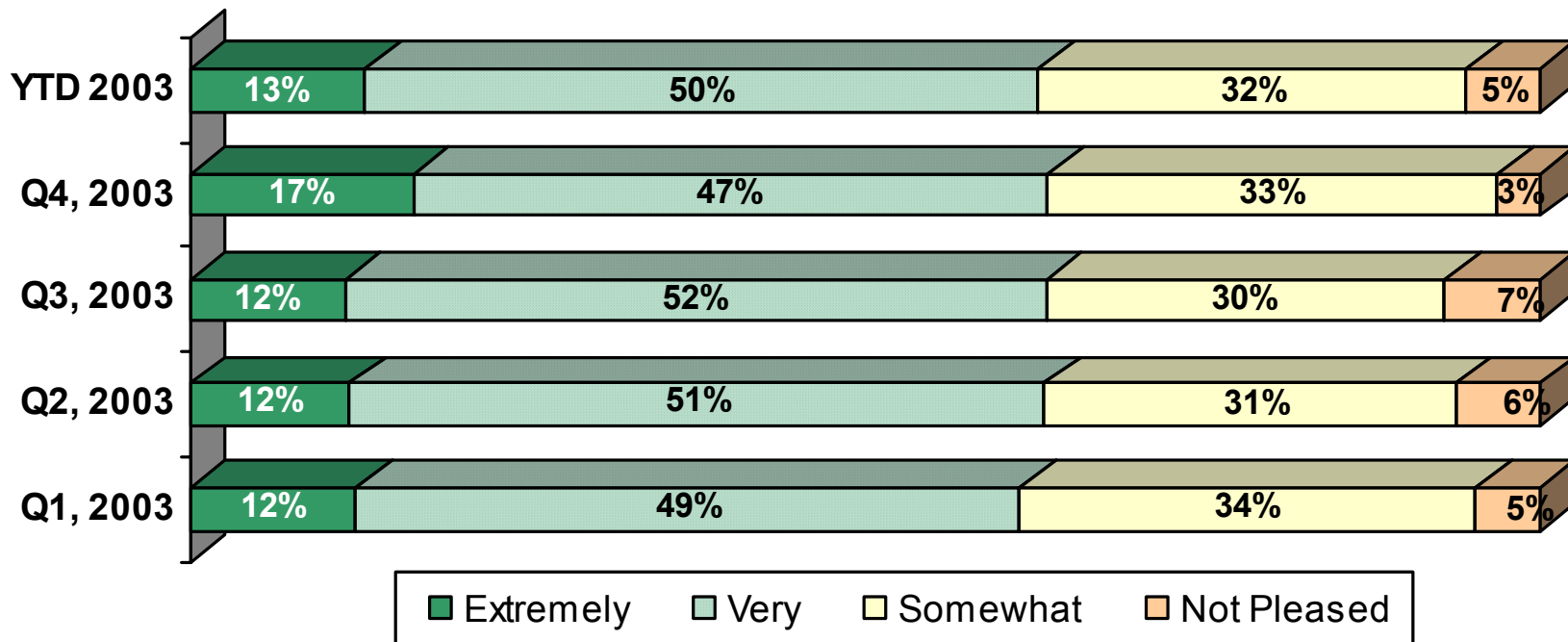
# Japanese Market: Hawaii Visitation (Q7)

Of Japanese international travelers, almost two-thirds (60%) have visited Hawaii in the past, but the proportion drops by half (to 28%) when looking at the past three years. Meanwhile, the average number of visits increases with more recent visitation, which follows the same pattern, albeit lower numbers than seen among US travelers.

	Visited Hawaii				
	2003 YTD	W1: Jan-Mar:	W2: Apr-Jun:	W3: Jul-Sept	W4: Oct-Dec
<b>Total Japanese Market (Base)</b>	<b>1,642</b>	<b>422</b>	<b>410</b>	<b>408</b>	<b>402</b>
<b>% Ever Visited Hawaii</b>	<b>60%</b>	<b>57%</b>	<b>63%</b>	<b>64%</b>	<b>55%</b>
<b>Average # of Trips to Hawaii</b>	<b>2.4</b>	<b>2.2</b>	<b>2.5</b>	<b>2.4</b>	<b>2.2</b>
<b>% Visited Hawaii Past 3 Years</b>	<b>28%</b>	<b>28%</b>	<b>30%</b>	<b>29%</b>	<b>26%</b>
<b>Average # of Trips to Hawaii</b>	<b>3.0</b>	<b>2.8</b>	<b>3.4</b>	<b>3.1</b>	<b>2.8</b>
<b>% Visited Past Year</b>	<b>13%</b>	<b>12%</b>	<b>14%</b>	<b>12%</b>	<b>12%</b>
<b>Average # of Trips to Hawaii</b>	<b>3.8</b>	<b>3.5</b>	<b>4.3</b>	<b>3.6</b>	<b>3.6</b>

# Japanese Market Hawaii Visitors: How Pleased With Last Visit (Q13) (Ever Visited)

In addition to ranking notably above competitive destinations on satisfaction (shown earlier), visitors rate Hawaii high in its ability to please. Almost two-thirds (63%) were *extremely* or *very* pleased, although visitors tend to choose the latter. Only 6 of the 937 total 2003 visitors stated that they were *not at all pleased*.

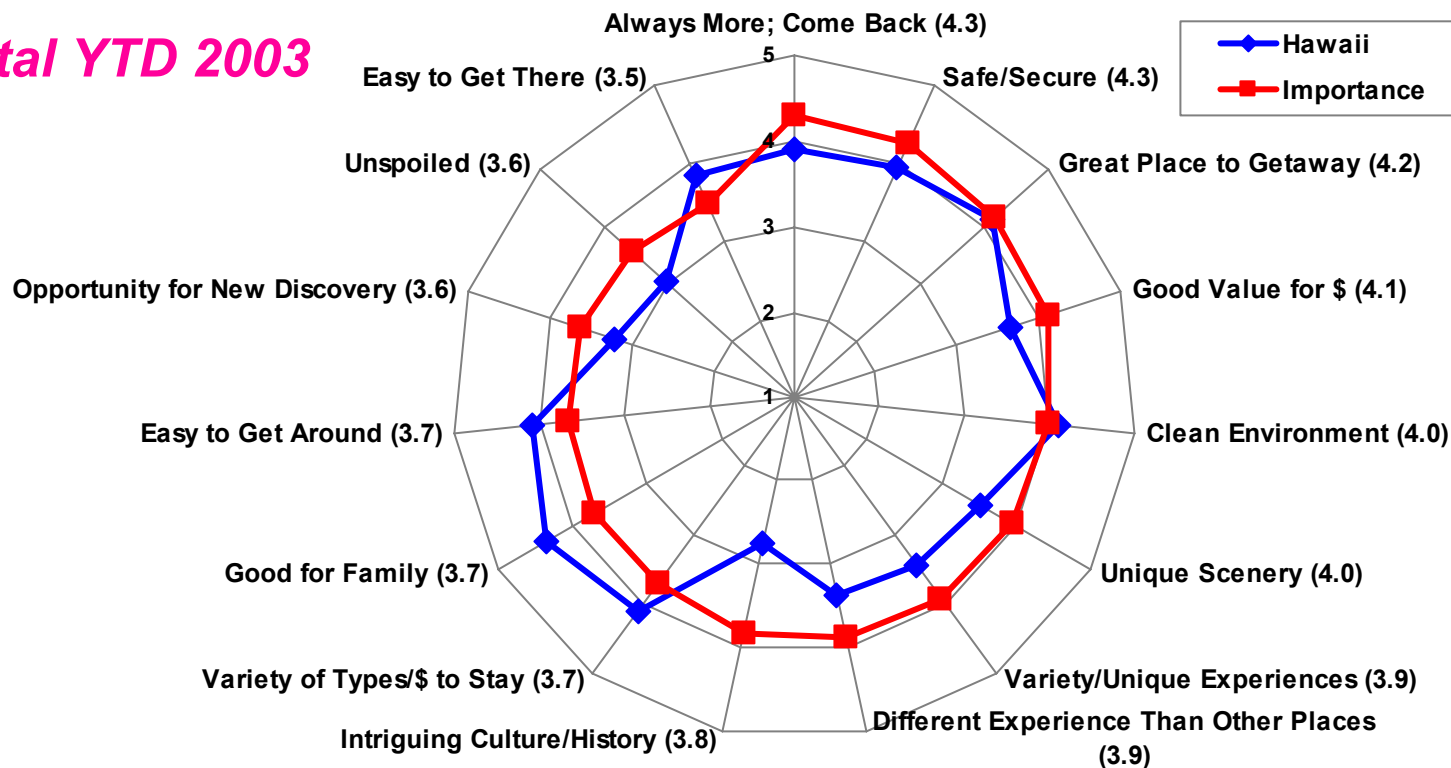


***Japanese Market:  
Importance of Attributes and Ratings of  
Hawaii vs. Competitive Destinations***

# Japanese Market: Importance/Ratings (Q5)

Although Japanese travelers generally assign high scores to the Hawaii experience, a gap usually exists between Hawaii's image and the importance of each attribute. That said, Hawaii excels on *Variety of Types/Prices of Places to Stay*, *Good for Family*, *Easy to Get Around*, and *Easy to Get There*. Hawaii's ratings reach the importance level set by two attributes: *Great Place to Getaway* and *Clean Environment*.

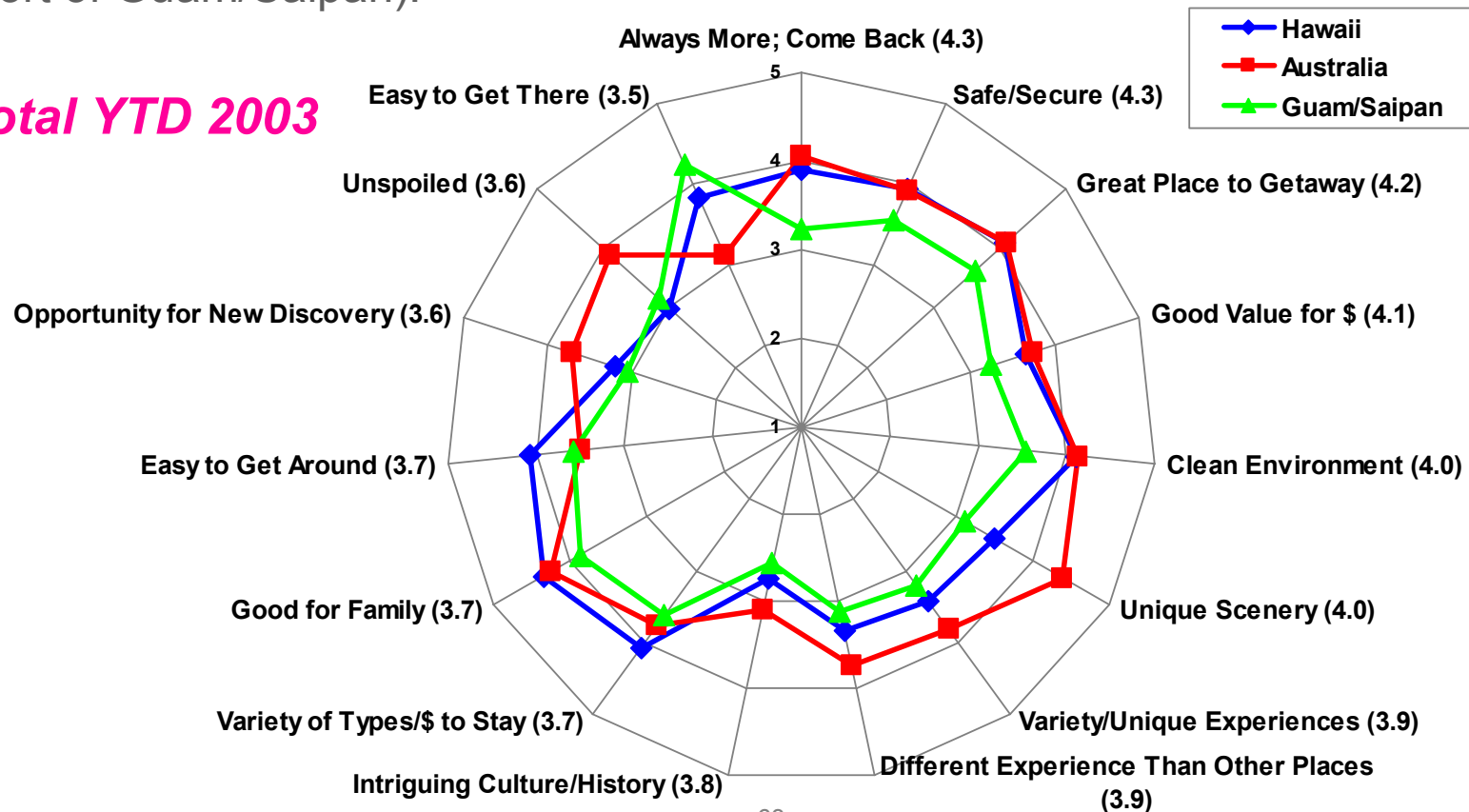
## Total YTD 2003



# Japanese Market: (Gap) Hawaii/Australia/ Guam-Saipan (Q5)

Guam/Saipan consistently falls short of Hawaii and Australia on most of these dimensions, except *Easy to Get There*. Australia tends to lead, but Hawaii matches it on several and receives better scores on: *Variety of Types and Prices of Places to Stay*, *Easy to Get Around*, and *Easy to Get There* (although short of Guam/Saipan).

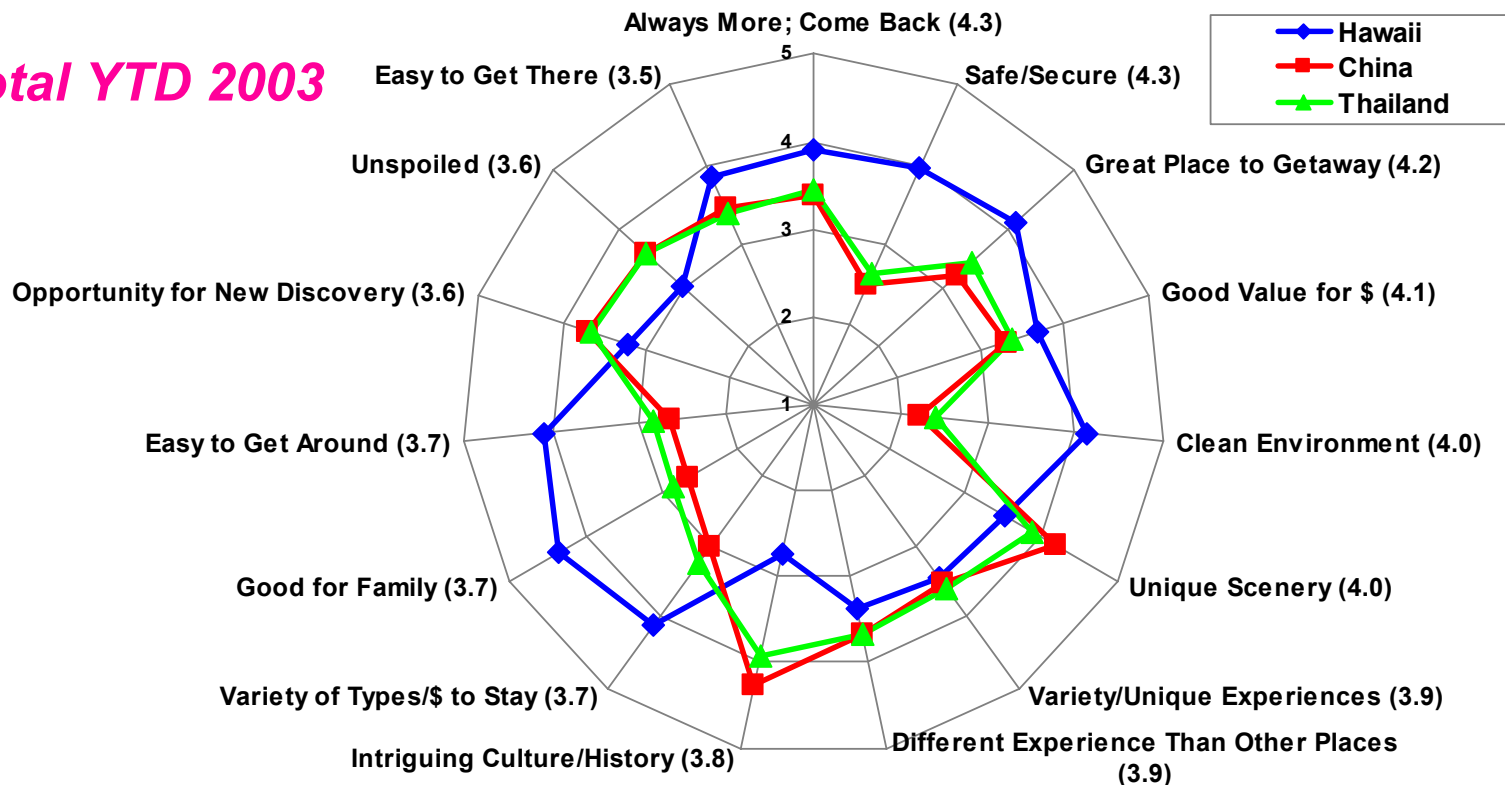
**Total YTD 2003**



# Japanese Market: (Gap) Hawaii/China/Thailand (Q5)

Hawaii “wins” by wide margins on most of these attributes, especially the five most important ones. However, China and Thailand receive higher scores on: *Unique Scenery Unlike Anywhere Else, Variety/Unique Experiences, Different Experience Than Other Places, Intriguing History and Culture, Opportunities for New Discover, and Unspoiled.*

**Total YTD 2003**





***Factor Analysis:  
Importance of Attributes in US and Japan***

# US Market: Importance Factors (Q5)

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The following two charts present the results from the factor analysis prepared from the importance of attributes assigned by respondents when selecting a destination (developed from total 2003 surveys).

The factors were prepared for the US and Japan separately to allow for cultural variances. They are listed in order of the importance of the factors.

The primary attributes for each factor are shown and are listed in the rank order of their “loading” score.

The importance score shown in parentheses is the importance of the primary attributes weighted by their loading scores to the factor.

# US Market: Importance Factors (Q5)

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**Easy, Value, Safe, Clean (4.0):** Easy to get there, good value for money, easy to get around, safe/secure, clean environment, variety of types/prices of places to stay

**Unique and Unspoiled (3.7):** Unique scenery unlike anywhere else, unspoiled and not over-developed

**New Discoveries/Unique (3.5):** Opportunities for new discoveries, variety of cultural activities, always new activities, more to “come back for,” intriguing history/culture, variety of unique experiences, different experience than other places

**Good for Family/Friendly (3.3):** Good for family/children, local people are friendly

**Social Scene (3.2):** Romantic, variety of nightlife, place to “get away from it all,” cuisines and dining options

**Events & Entertainment (2.8):** Special events/festivals, entertainment (theatre, concerts, galleries), shopping

**Active Recreational Choices (2.7):** Adventure activities; nature activities, wide variety of recreational activities

**Golfing (1.6):** Great place to golf

# Japanese Market: Importance Factors (Q5)

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**Great Place to Getaway (4.2):** Great place to “get away from it all”

**Good Value/New Discoveries (4.1):** Good value for the money, more to “come back for,” opportunities for new discoveries, easy to get around

**Unique and Unspoiled (3.9):** Unique scenery unlike anywhere else, intriguing history/culture, unspoiled and not over-developed, different experience than other places, variety of unique experiences

**Clean, Safe, Family Oriented (3.7):** Clean environment, safe and secure, good for family/children, easy to communicate in native language, variety of types/prices of places to stay, easy to get there, local people are friendly

**Active Recreational Choices (2.8):** Nature activities, always new activities, adventure activities, many things to do for active lifestyles, variety of cultural activities, wide variety of recreational activities, great place to golf

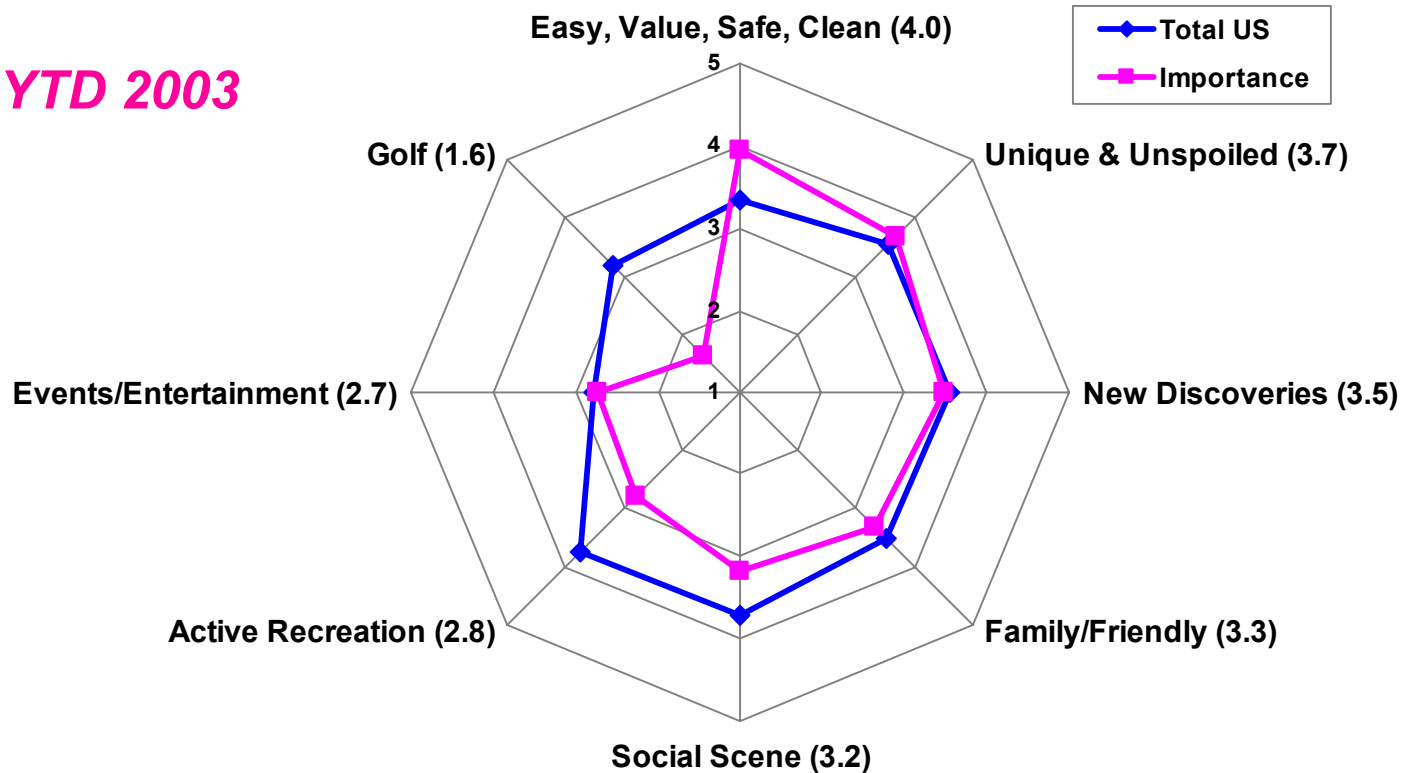
**Social Scene (2.8):** Variety of nightlife, entertainment (theatre, concerts, galleries), cuisines and dining options, romantic, special events/festivals, shopping

***US and Japanese Markets:  
Weighted Importance of Factor Group  
Compared to Weighted Factor Rating of Hawaii***

# US Market: Importance of Factors and Rating of Hawaii (Q5)

Ratings of Hawaii meet or exceed the importance level for every factor except *easy*, *value*, *safe*, and *clean*. The state is particularly strong on *active recreational choices*, *the social scene*, and *a place to play golf* (although it is important to only a subgroup of visitors).

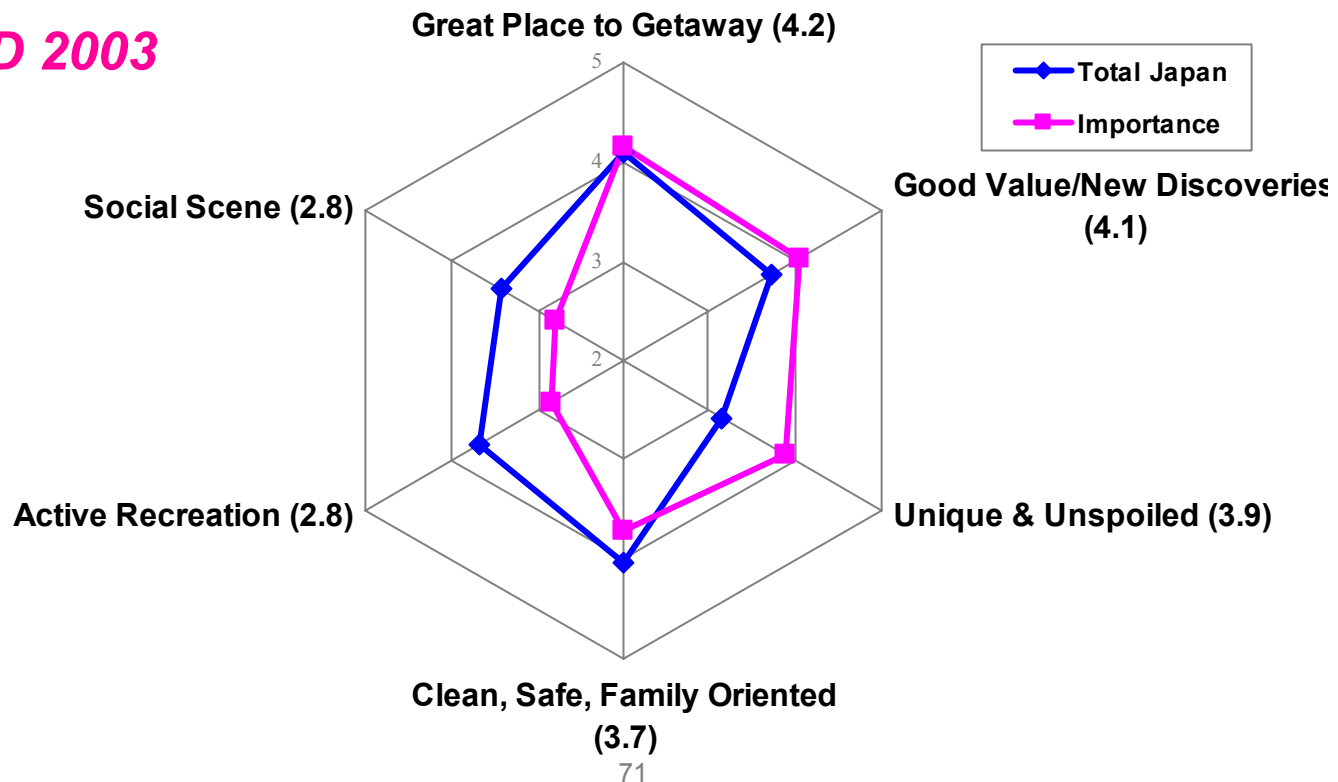
**Total YTD 2003**



# Japanese Market: Importance of Factors and Rating of Hawaii (Q5)

The Japanese rate Hawaii differently than US travelers. They categorize attributes differently and view their importance differently. The key reason for vacationing, to the Japanese, is to find a place to *get away from it all*. Hawaii meets this need. Although a gap exists between the importance and Hawaii's measure on *good value/new discoveries and unique* (scenery and culture) and *unspoiled*; Hawaii receives strong scores for the remaining factors.

## Total YTD 2003



***Rating of Hawaii by Visitor Type:  
Those Who Assign High Importance to  
Golf, Cuisine, Culture, or Romance/  
Adventure in US and Japan***

***Ratings of Hawaii by Factor Groupings,  
Each Weighted by Its Primary Components,  
Appear on Following Spider Charts***

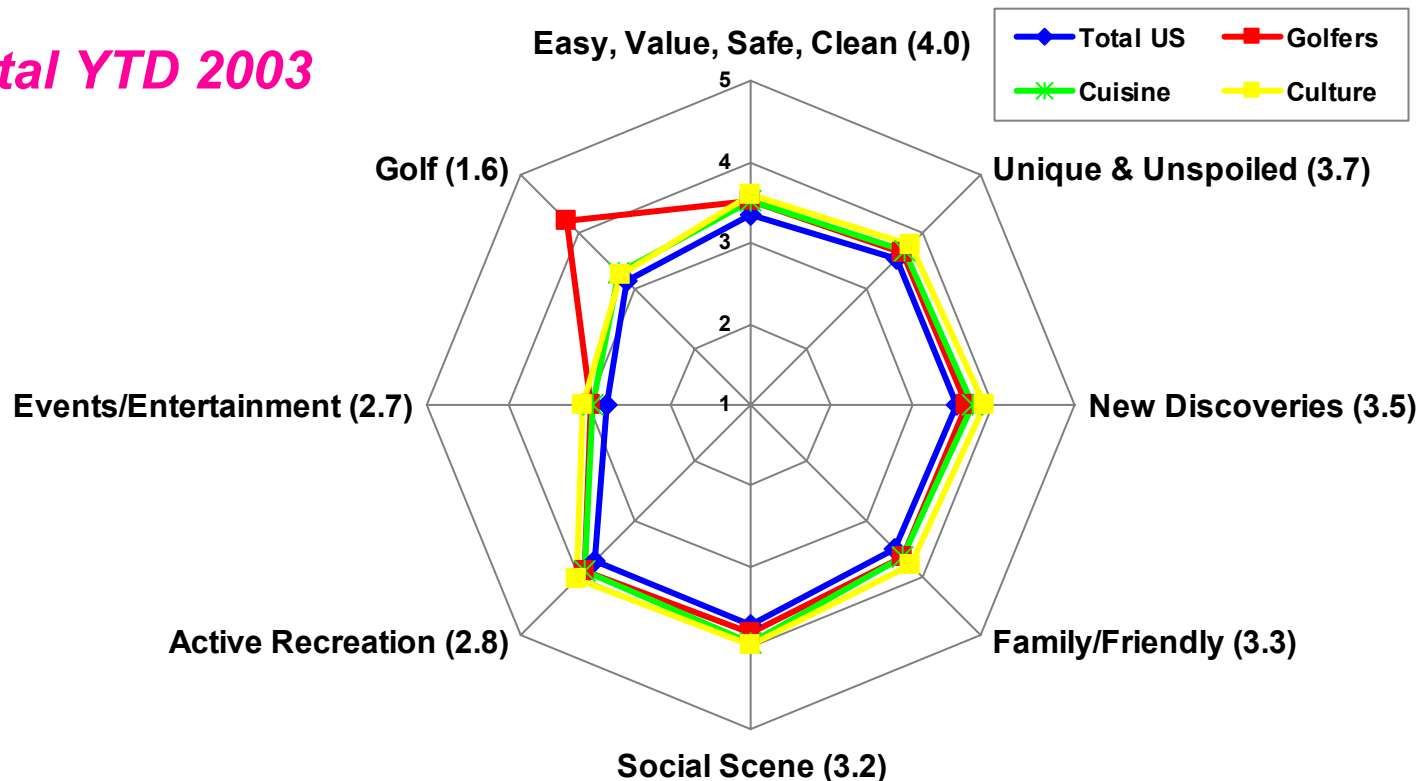
***Quarter by Quarter Changes Located in Appendix***



# US Market: Rating of Hawaii by Important Activity (Q5)

Generally, those who consider specific features of a destination to be important typically rate Hawaii very high on them (Total US respondents, in blue, always rate Hawaii at or below those with specific interests). The result is most noticeable among *golfers*. The least variation occurs in “cuisine,” in part because the attribute is more universally appealing.

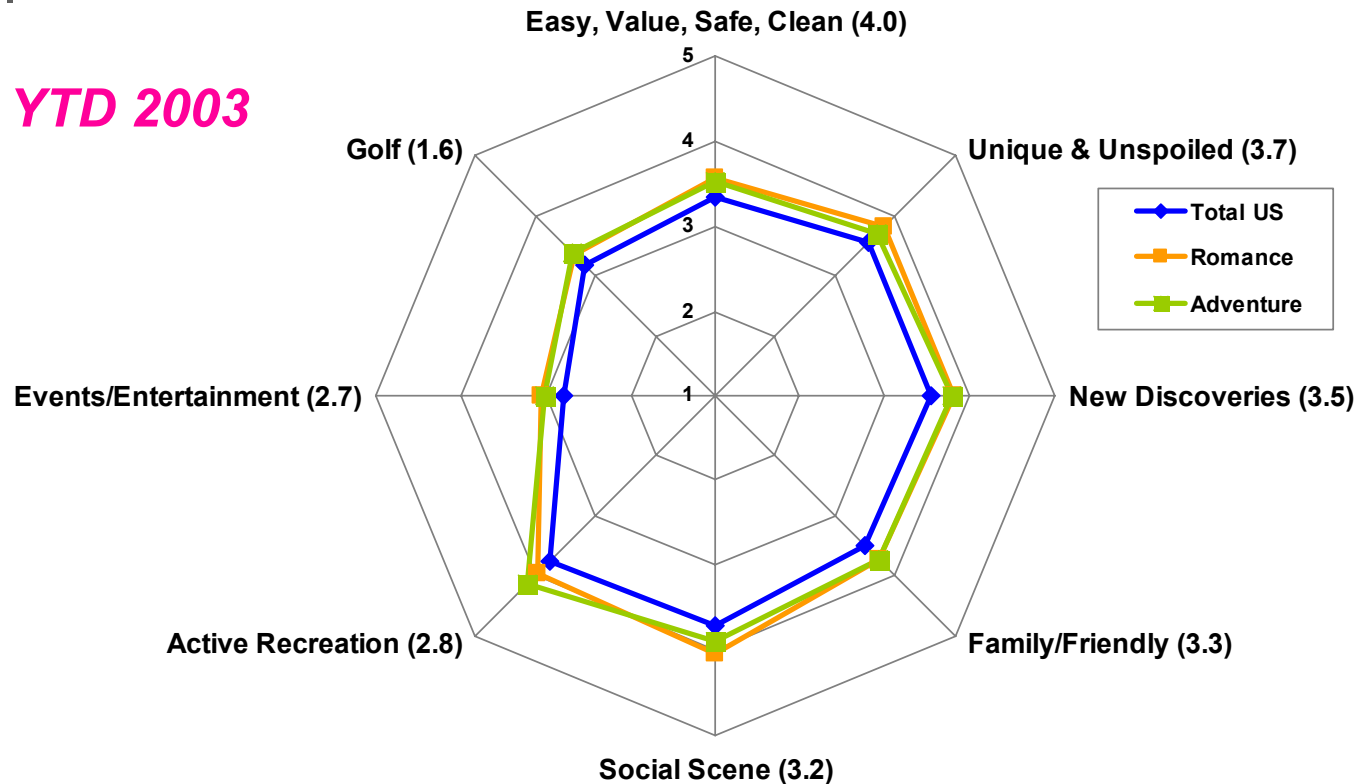
**Total YTD 2003**



# US Market: Rating of Hawaii by Important Activity (Q5)

Those who travel to destinations for romance and adventure assign high scores to Hawaii on almost all aspects. Adventure seekers seem especially pleased with Hawaii's *active recreation* options. *Romantics* rate the *social scene* (where it "loads" in the factors) somewhat higher than others.

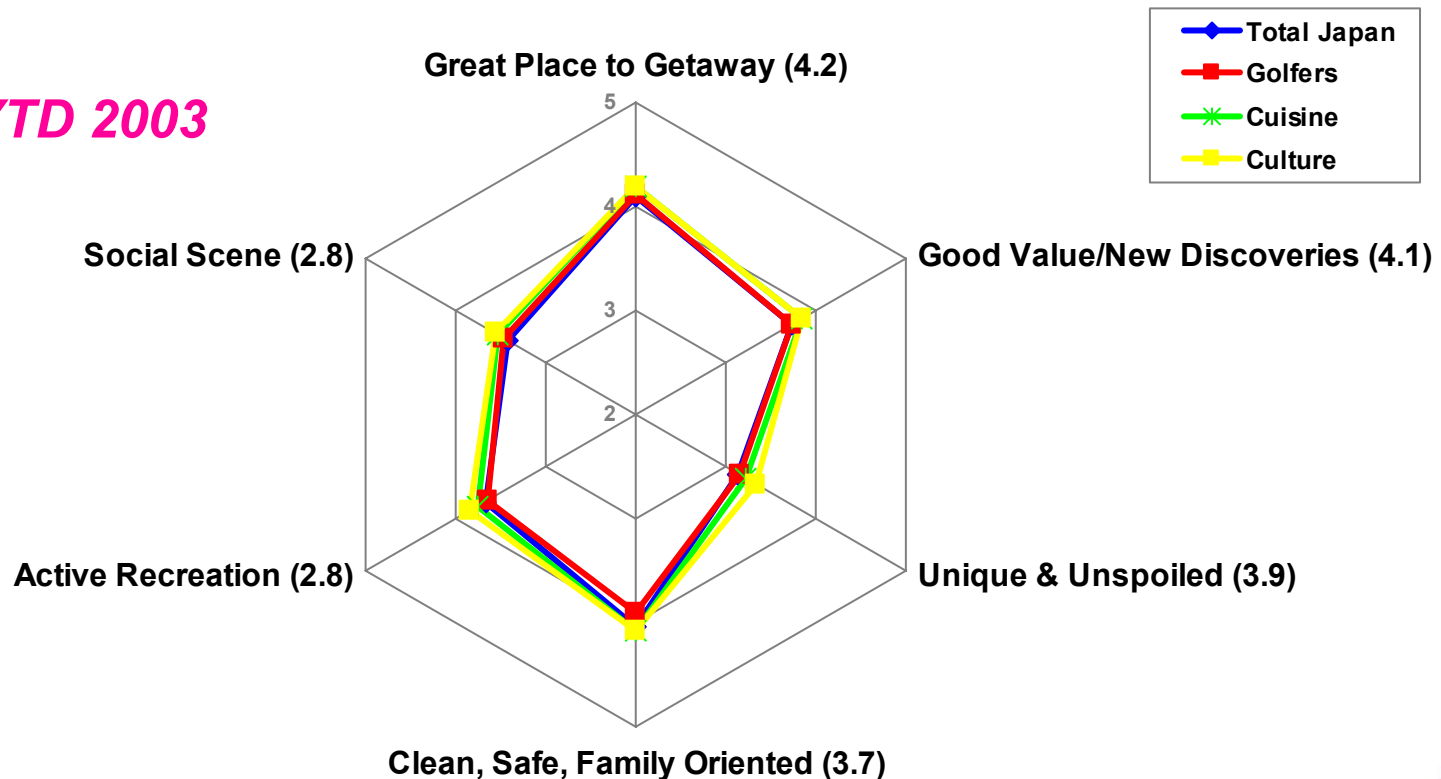
**Total YTD 2003**



# Japanese Market: Rating of Hawaii by Important Activity (Q5)

The Japanese travel types show very little variation when rating Hawaii. Culture Seekers tend to rate Hawaii higher than other groups, Golfers a bit lower than others, and Cuisine Seekers generally follow the pack.

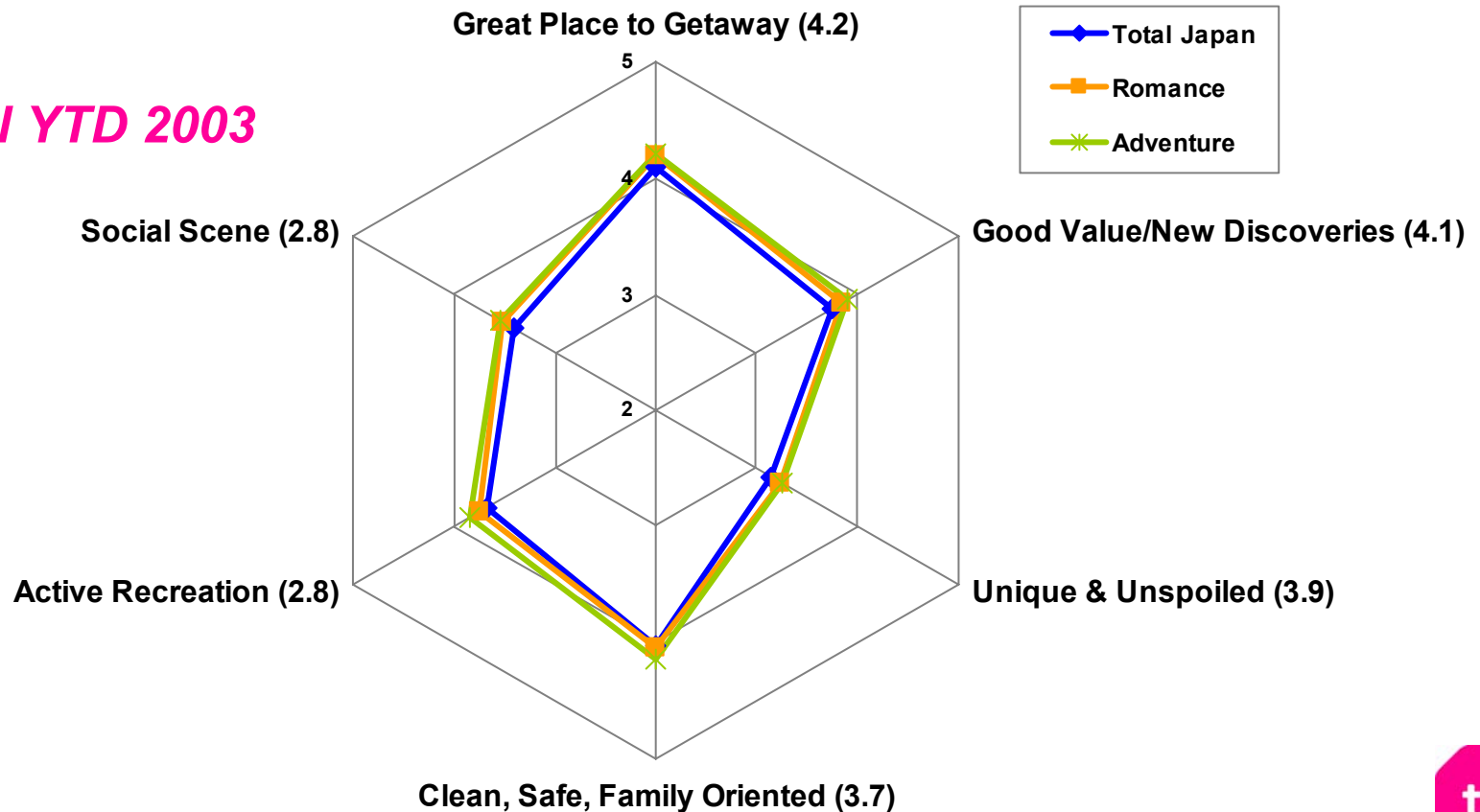
**Total YTD 2003**



# Japanese Market: Rating of Hawaii by Important Activity (Q5)

Romance and Adventure Seekers from Japan generally score Hawaii higher than total visitors. For most attributes, they assign ratings similar to each other, but Adventure travelers consider Hawaii's *active recreational choices* slightly more appealing than Romance Seekers.

**Total YTD 2003**



***Rating of Hawaii by Spending Levels  
in US and Japan***

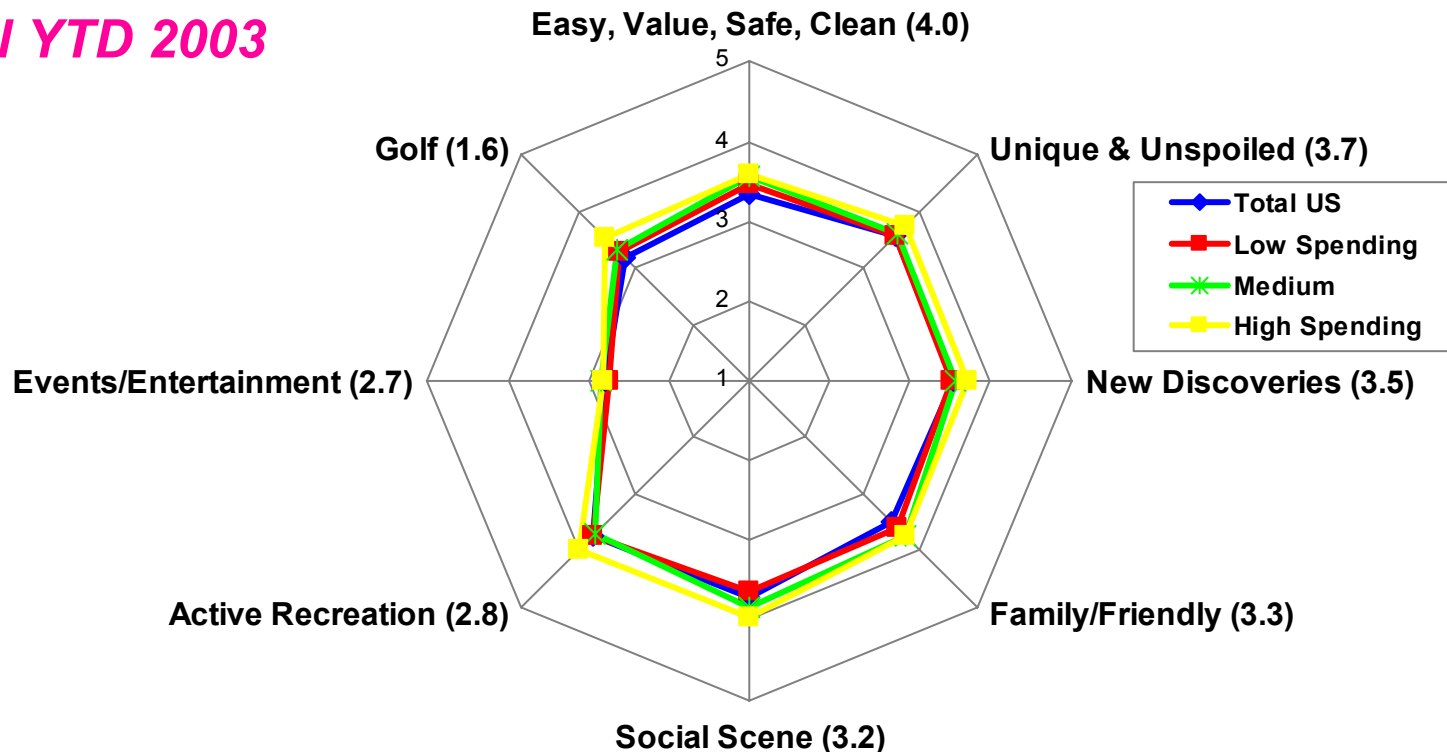
***Ratings of Hawaii by Factor Groupings,  
Each Weighted by Its Primary Components,  
Appear on Following Spider Charts***

***Quarter by Quarter Changes Located in Appendix***

# US Market: Rating of Hawaii by Spending Level (Q5)

Visitor spending levels do not reveal much distinction in their assessment of Hawaii, with a few exceptions. Low “spenders” rate Hawaii’s social scene below other spending groups – possibly because they are less likely to take advantage of it. High spenders are attracted to all of Hawaii’s features, and consistently rate them higher.

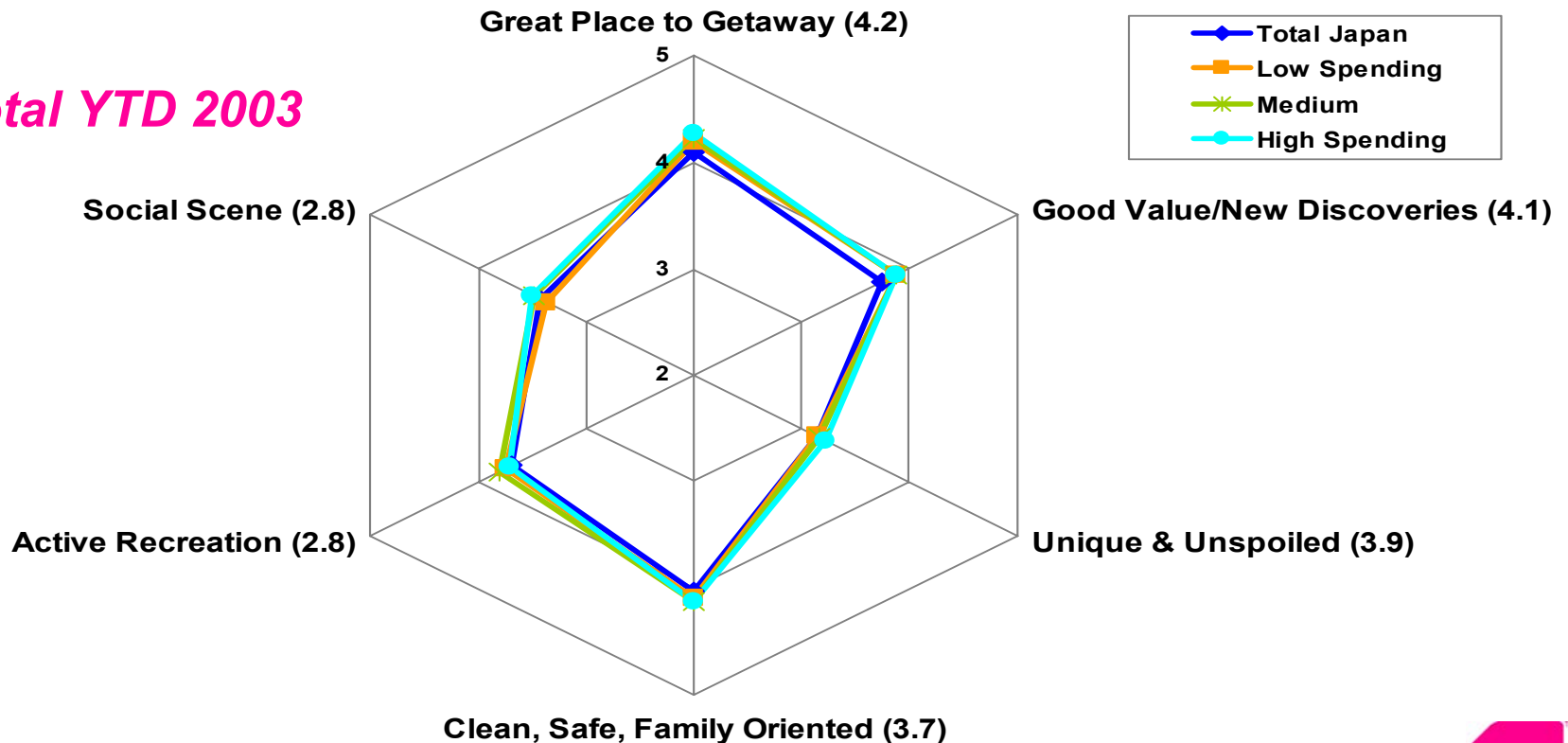
## Total YTD 2003



# Japanese Market: Rating of Hawaii by Spending Level (Q5)

Similar to US results, spending levels reveal only small differentiations in Hawaii attribute ratings. As noted for the US market, High and Medium Spenders rate Hawaii somewhat stronger than Low Spenders on most factors.

**Total YTD 2003**



***Rating of Hawaii by Experiential Seekers  
in US and Japan***

***Ratings of Hawaii by Factor Groupings,  
Each Weighted by Its Primary Components,  
Appear on Following Spider Charts***

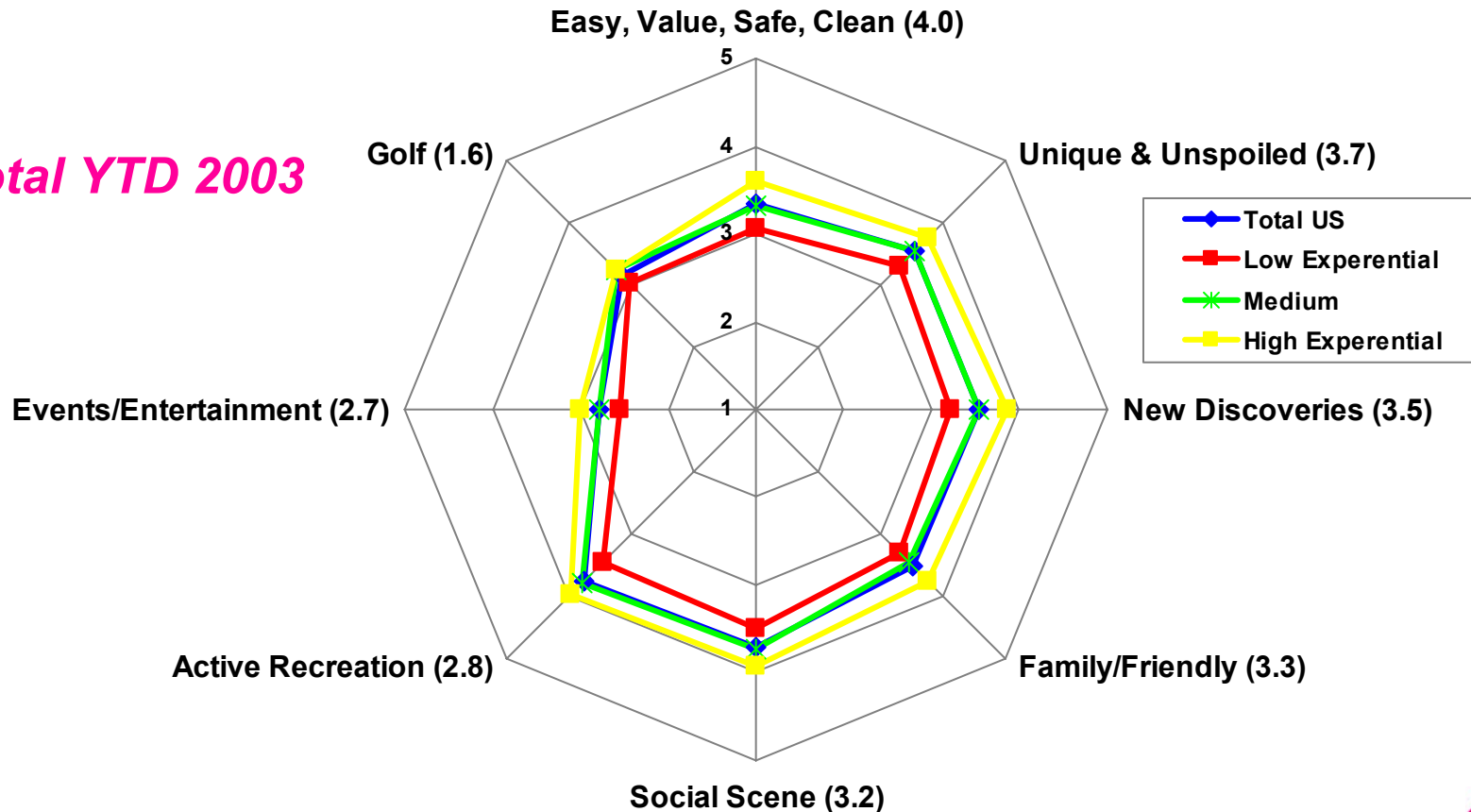
***Quarter by Quarter Changes Located in Appendix***



# US Market: Rating of Hawaii by Experiential Seekers (Q5)

The high experiential seekers consistently rate Hawaii's factors at or above all other travelers. In contrast, low experiential seekers rate them lower than others.

**Total YTD 2003**



# Japanese Market: Rating of Hawaii by Experiential Seekers (Q5)

Japanese High Experiential Seekers, similar to the US market, consistently rate factors for Hawaii higher than other visitors.

**Total YTD 2003**

